



ESSENTIAL MANAGERS

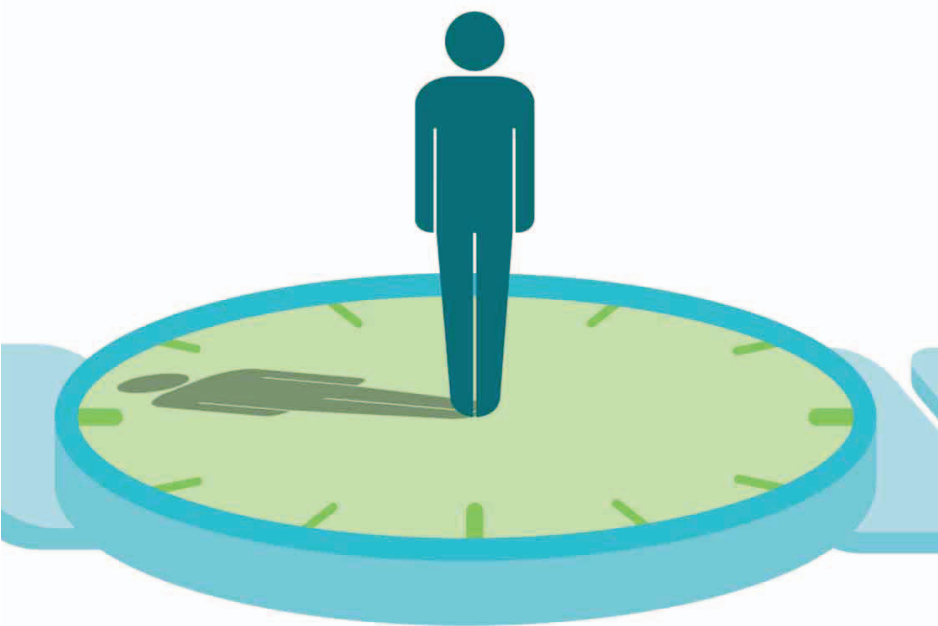
Project Management

>>> PLANNING
ORGANIZING
EVALUATING



**ESSENTIAL
MANAGERS**

PROJECT MANAGEMENT



**ESSENTIAL
MANAGERS**

PROJECT MANAGEMENT





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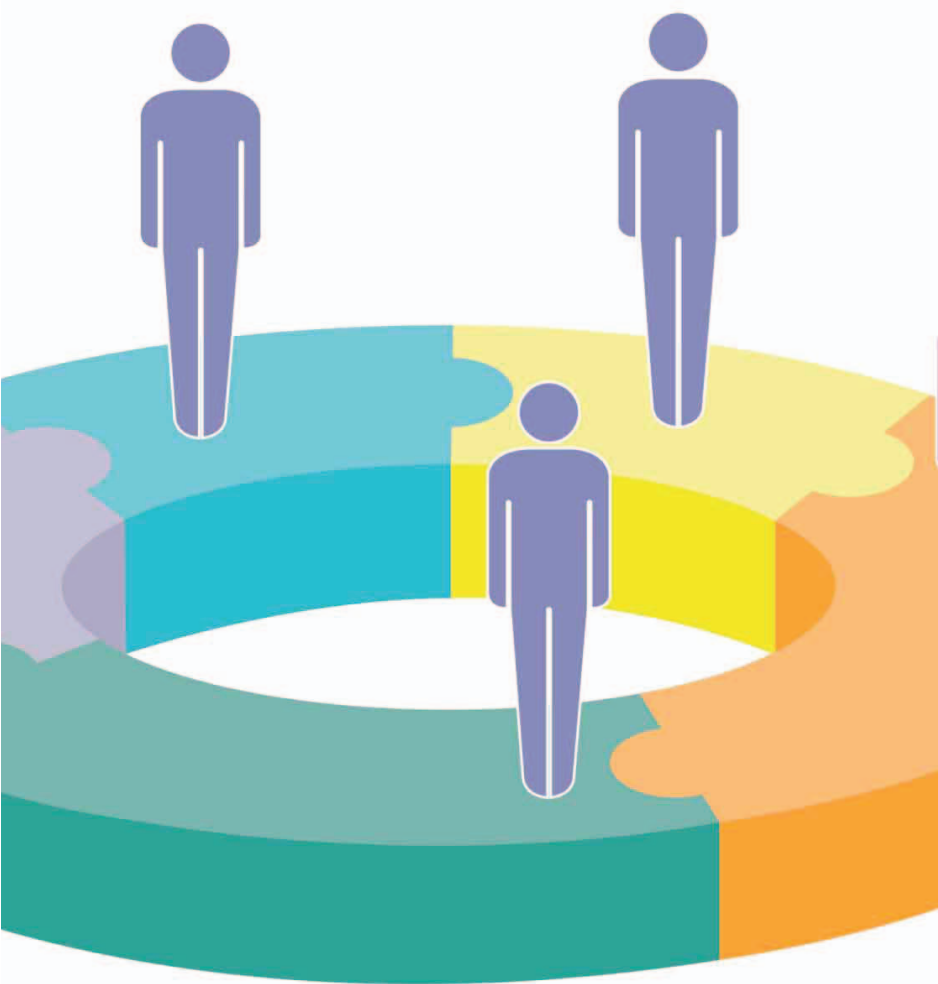
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Introduction

Project management is the skill of moving from ideas to results and, as such, is applicable to every significant initiative we are given or come up with ourselves. Today, individuals, organizations, and nations need project management skills more than ever in a world that values individual and collective initiative above just about any other attribute.

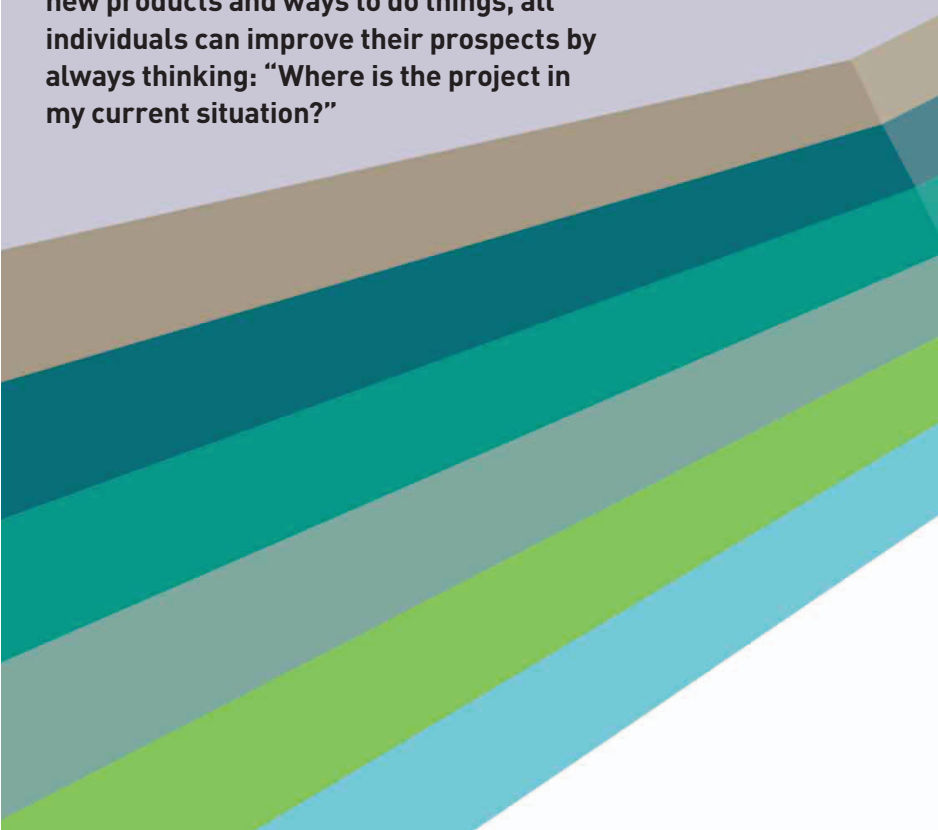
Project Management outlines a range of practical understandings and skills that will make your projects both successful and satisfying. It will provide you with common-sense solutions to the project management issues you will face as you plan and implement a project, and the tools, tips, and techniques it contains are intended to help you achieve consistent success using minimum resources. The book is written for those taking their very first steps in project management, but also offers many helpful reminders to those with more experience.

In the final analysis, your success as a project manager is down to you; it will depend on your ability to make your vision of “what can be” more influential in your own and other people’s thinking and actions than the reality of “what currently is.” If the following pages guide, challenge, and energize you in this quest they will have fulfilled their purpose.



Thinking “project”

Projects are the mechanism by which organizations and individuals change and adapt to take advantage of new opportunities or to counter threats. In a world in which business competitiveness is based on a search for new products and ways to do things, all individuals can improve their prospects by always thinking: “Where is the project in my current situation?”





10	WHAT IS A PROJECT?
14	THE PROJECT SEQUENCE
18	DEFINING THE TEAM
20	BEING PROJECT MANAGER
22	WORKING WITH YOUR SPONSOR
24	DOCUMENTING PROGRESS



01

What is a project?

A project is a piece of work that is designed to bring about an agreed upon beneficial change within a fixed timeframe using specified resources. Projects usually require the coordinated activity of a number of people to achieve that outcome, and often incorporate an element of risk. The projects in this book focus on change in organizations, and run for a defined length of time alongside the day-to-day work of an organization.

What makes a task a project?

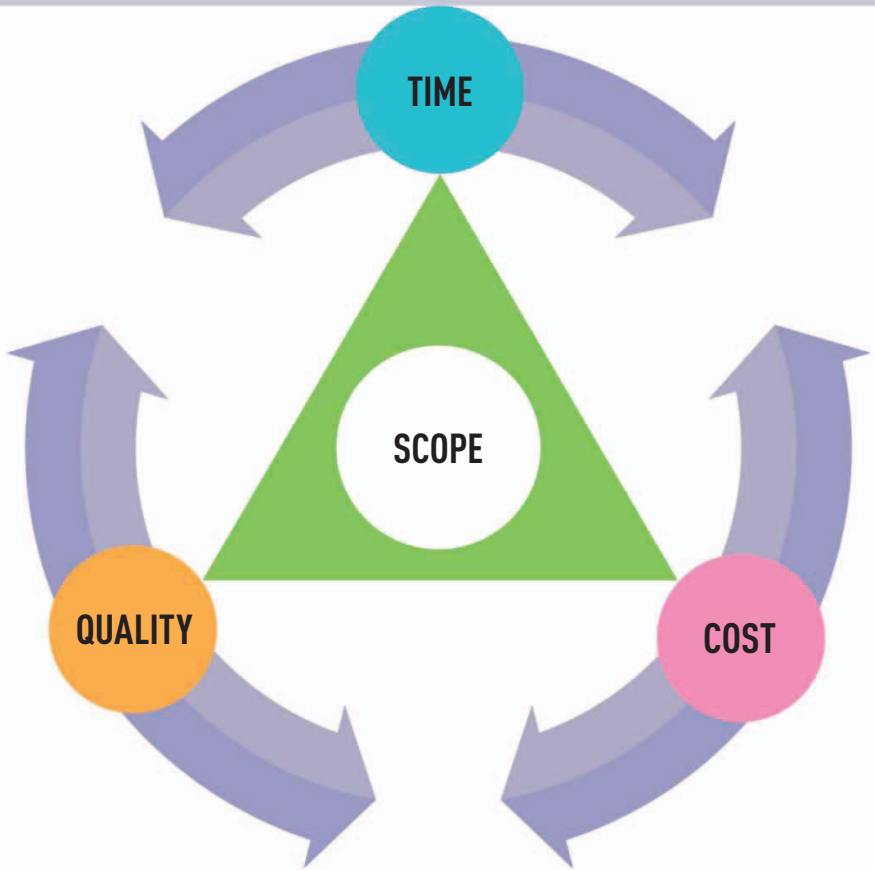
Projects are the way in which human creativity is most effectively harnessed to achieve tangible, lasting results. In the past they may have been called something different, but building a pyramid, painting a ceiling, or founding a nation all required vision, planning, and coordinated effort—the essential features of what we now call a project. In practical terms, just about any initiative or piece of work that is too large or unfamiliar to be completed successfully without some measure of preparation and planning can, and usually should, be approached as a project.

Vision, planning, and coordinated effort—the essential features of a **project**

97%

of organizations believe that **project management** is critical for **good performance** and **success**

A project is a “one-time” **scope of work** defined by three parameters—**time, cost, and quality**



Defining a project

At its simplest level, a project is a “one-time” scope of work defined by three parameters—time, cost, and quality. In other words, it is the means by which a particular result is delivered using specified resources within a set period of time.

For most projects, one of these three parameters is “fixed” (i.e., should not or cannot change), but there is flexibility in at least one of the other two. Where the

quality of the product is fixed (bringing a new drug to market, for example), costs have a tendency to rise and deadlines to slip if work is more extensive or complex than was first envisioned. Where the deadline is fixed (as for a tender deadline or a business conference), people either throw more resources at the project to make sure that it is ready on time, or they cull desirable but nonessential features in order to deliver the essential elements of quality within the timeframe available.

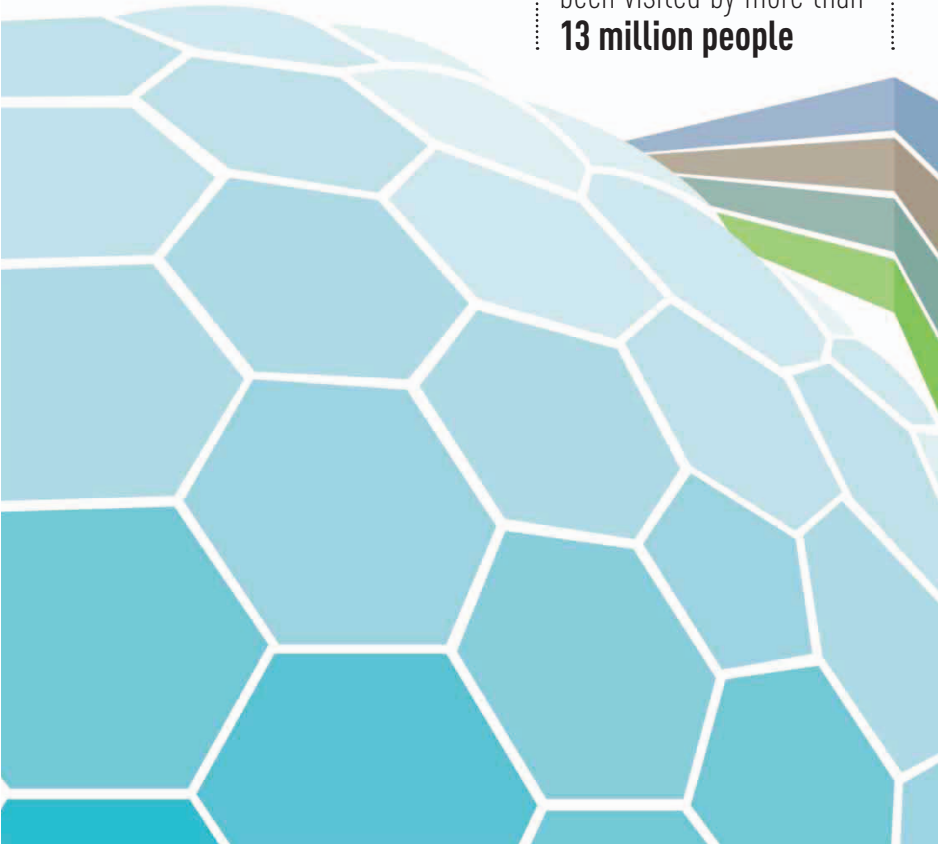
Achieving change

Some projects are highly visible—large and prestigious building projects, for example—while for others, no one except those directly involved has any understanding of, or interest in, what they will deliver.

Whatever the size and nature of a project, the principal goal is always to bring about a change that is viewed as

beneficial by the person or people sponsoring it. Many organizations use project management systems and methods to implement change. These systems include CPM (Critical Path Method), PERT (Program Evaluation and Review Technique), and PRINCE 2 (PProjects IN Controlled Environments). Some of these were devised for specific industries, but have become widespread.

..... The **Eden Project** has
..... been visited by more than
..... **13 million people**



Case study



SETTING THE STANDARD

When Tim Smit pitched the idea of creating a science-based visitor attraction showcasing 100,000 plants from around the world in an abandoned clay pit in southwest England, few would have expected the Eden Project to have become the icon it is today. Despite the many technological challenges of creating the world's largest greenhouses—two giant transparent domes—the main construction phase was complete by March 2001. Since then, it has been visited by more than 13 million

people, at a rate of over one million a year, and has brought hundreds of millions of dollars to the local economy. Just as important to Smit, Eden is now a significant contributor to the global debate on sustainable development and environmental issues. As with any high-profile project, commentators offer a variety of explanations for its success: technology made the original design and spectacular scale possible, but Smit's vision, inspirational leadership, and refusal to compromise on quality were undoubtedly central.

- **January 1995:** Tim Smit has the idea for creating a huge site displaying the world's most important plants. **In October 1996,** architects sketch initial plans based on the shape of giant bubbles.
- **October 1998:** it rains every day during the first months of construction, filling the chalk pit with water. The project devises a record-breaking drainage system.
- **March 2000:** fund-raising reaches the level needed to gain 50% match-funding from the Millenium Commission grant promised in 1997.
- **March 2001:** the Eden Project opens to visitors and by **July 2008,** the ten millionth visitor arrives and is greeted by Tim Smit in person.

The project sequence

The life cycle of any project consists of six main phases: initiation, definition, planning, control, implementation, and review. At whichever point you, as project manager, enter the project’s life, be sure to acquaint yourself as fully as possible with any preceding phases you have missed.

Defining project phases

The first phases of the project should lead to a clear outline of the overall parameters of time, cost, and quality. These factors form the scope of your project (see p.11).

The initiation and definition phases involve using tools and approaches to identify the situation to be addressed, the desired end result, and the core team responsible for making it happen. Once these are established, the planning phase focuses on the detail of what has to be produced and how this can be done most effectively with minimum risk. At this stage, schedules and budgets should be finalized and the elements of risks and benefits should be added to the scope of the project.

Tip

FOCUS ON DEFINITION

Fully explore the “**whats**” and “**whys**” of the project before you start to make **practical plans**—this will help you avoid the need for costly revisions in later phases.



The six phases of a project:

01 | INITIATION

02 | DEFINITION

03 | PLANNING

04 | CONTROL

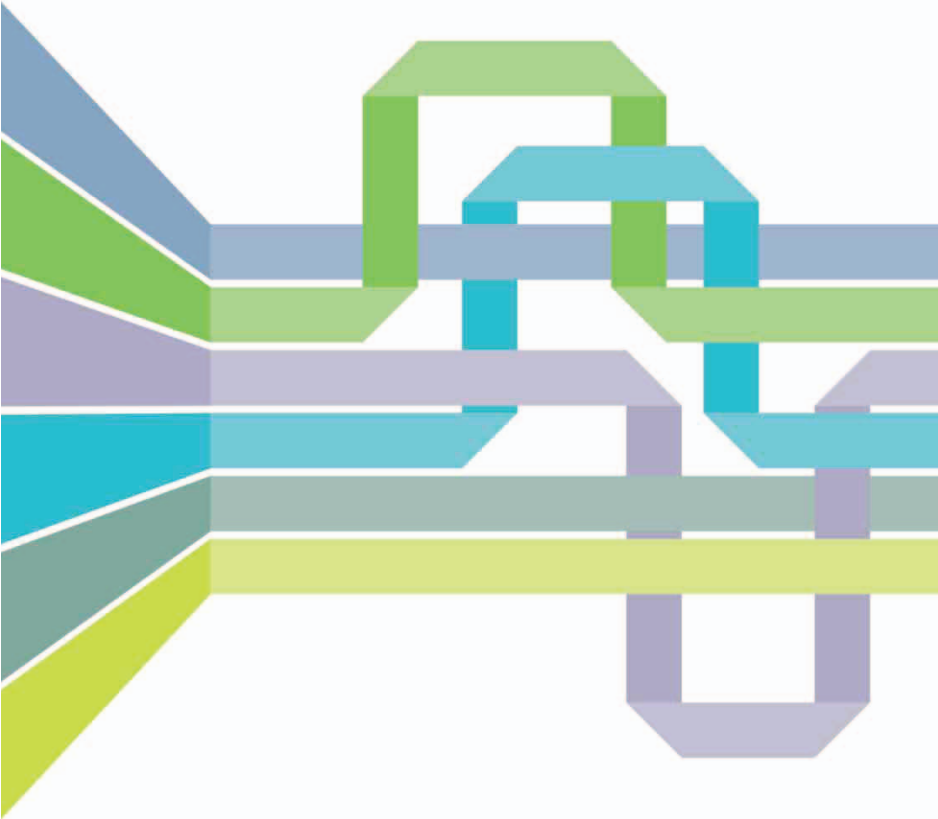
05 | IMPLEMENTATION

06 | REVIEW

Scope and overlap

The project's scope describes the desired end result of a project. Scope often includes reference to the context in which the end result of the project will be delivered, and who the end user will be. There is some overlap between project phases, especially at the start, and planning continues throughout the project. Generally, there comes a point at which significant resources are committed, and the control phase of the work begins.

The **planning phase** focuses on the **detail** of what has to be **produced** and how this can be done most **effectively** with **minimum risk**



Controlling and implementing

The schedules and budgets that you established while planning will allow you to track progress and make adjustments as needed. As the control phase nears completion, focus switches to preparation for the moment when the results will “go live.” While you should have been considering the needs and expectations of end users at every stage, your primary focus during this implementation phase should be taking steps to ensure that they react positively to the change your project has brought about. Plan your review stage around predefined criteria by which the project’s success can be measured. These can then be used to declare it complete before moving into a phase where resources are reallocated and lessons learned.

77%
of **high-performing**
US organizations
understand the **value**
of project management

The six phases of a project:

INITIATION

DEFINITION

PLANNING

CONTROL

IMPLEMENTATION

REVIEW

40%
of **low-performing**
US organizations
understand the **value**
of project management

Maintaining flexibility

While in theory the phases provide a logical sequence, in practice they often overlap, so you need to adopt a rolling process of continuous review during the definition, planning, and control phases. For example, you may need to modify the initial scope (see p.11) of a project to fit

with what proves to be possible once you have produced a first draft of the plan. Similarly, experience gained from work early in the project may lead you to identify flawed assumptions about the duration and complexity of tasks, leading to a reevaluation of timescales, budgets, and other resources.



Identifying the problem to be solved or **opportunity** to be exploited.

Refining your **understanding** of what you want to **achieve**, by when, and with what resources.

Deciding in detail how to achieve **the objective**—timescales, resources, responsibilities, and communications.

Doing the work, monitoring progress, and **adjusting the plan** according to need.

Passing what you have **created** over to those who will be using it, and **helping them to adjust** to any changes.

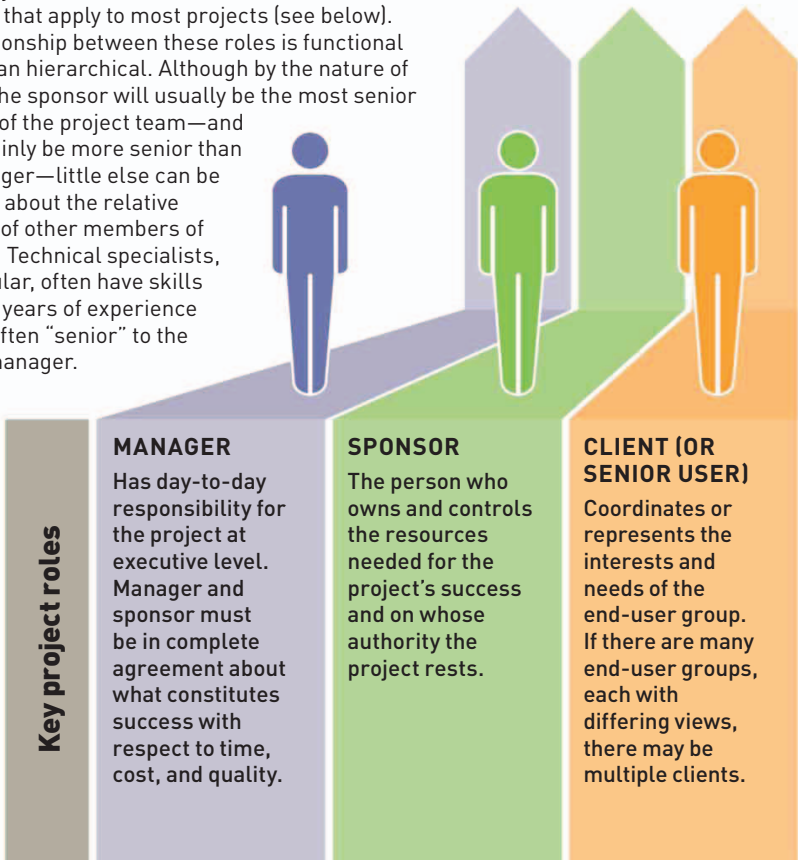
Assessing the outcome and looking back to see if there is anything you could have done differently or better.

Defining the team

Role clarity is essential if you are to deliver a successful project, as every project is a new and often unique scope of work, and project teams are often built from scratch. Each stakeholder—a person who has influence over, or interest in, the process or outcome of the project—should be clear about exactly what the role entails and what should be delivered.

Understanding key roles

Every project is different, but there are a number of key roles that apply to most projects (see below). The relationship between these roles is functional rather than hierarchical. Although by the nature of the role the sponsor will usually be the most senior member of the project team—and will certainly be more senior than the manager—little else can be assumed about the relative seniority of other members of the team. Technical specialists, in particular, often have skills based on years of experience and are often “senior” to the project manager.



Tip**BEWARE THE BUYER**

Buyers often **wield significant power** where a project has been procured. Those who also act as the client can sometimes have an adversarial relationship with the project. Handle such clients carefully, using the sponsor where necessary.

Knowing your team

Your project team will generally be made up of people from your organization and contractors—referred to as the internal and external team, respectively. Clearly, these people are key stakeholders in the success of your project, so as project manager you must make their motivation and focus a priority. This may take some skill and effort: team members often have other work to juggle. In addition, they will be influenced by a second ring of stakeholders over whom you have no direct control (or of whom you have no knowledge), such as their line managers, colleagues, clients, and suppliers.

**QUALITY ASSURANCE**

In larger projects, a separate team may be assigned to ensure that all the prescribed methodologies are carried out properly. (In many smaller projects, the sponsor should do this.)

TECHNICAL SPECIALISTS

In many projects, success depends on the input of a small number of people with expert essential skills, high levels of crucial access, or personal decision-making authority.

BUYER

Buyers procure or commission projects on behalf of end users and they are judged primarily on their ability to source reliable suppliers and negotiate competitive rates on contracts.

END USERS

Often, end users are represented by the client, but there are key points in most projects when it is helpful to communicate directly with this group.

Being project manager

As a project manager, you will be the central hub around which your project team is formed. Much of your success will depend on your ability to make the project something others want to be involved in or, at the very least, do not want to oppose.

Owning the project

Whether you have been delegated the role of project manager, or you sold an idea upward to someone capable of sponsoring it, you are likely to have demonstrated personal and managerial competence and commitment to the change under consideration.

“Competence” and “commitment” are the sorts of solid but colorless words often found in management books; however, the last thing a project manager can afford to be is colorless. Indeed, the very best project managers are a paradoxical combination of “larger than life”—self-confident, decisive, creative, and engaging—and self-effacing—down-to-earth, hands-on, and eager to learn from other members of their team and promote their contributions.

Tip

PLAY DEVIL’S ADVOCATE

Anticipate opposition by thinking through possible criticisms of your project and coming up with **effective** counterarguments so that you are **well prepared** to tackle negative views.



Success comes from building diverse individuals into a **strong team** and **motivating** them to produce **quality results** within the requisite **timeframes**

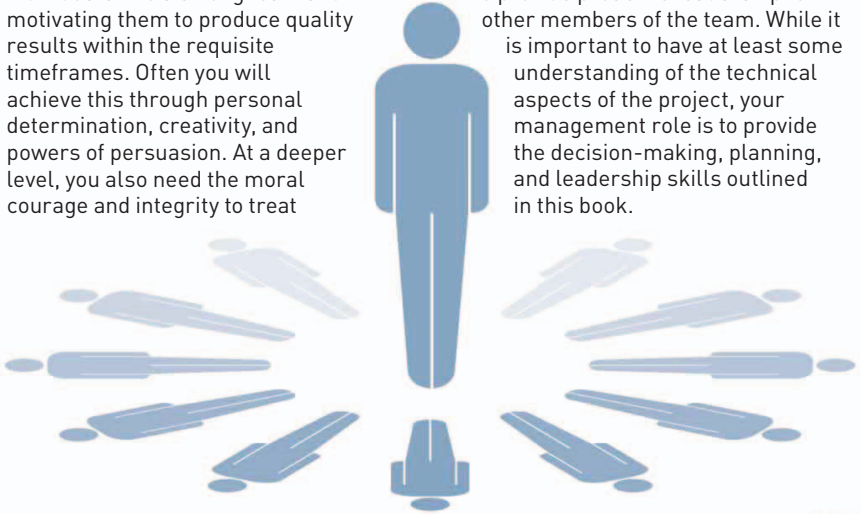
Selling the idea

To be fully convincing as a project manager, you must first be convinced of the value of the initiative under consideration yourself. If you do not believe the results are attainable, or are lukewarm about their value, you are unlikely to make the sacrifices or identify the creative solutions required when the going gets tough—as it almost invariably will at some point. Furthermore, you must be able to communicate your enthusiasm to others and have the confidence to stand up to opposition both inside and outside the project team. Conversely, you must be a good listener—able to sift through the opinions of others and take on their ideas whenever they improve the quality of outcome or the likelihood of success.

Taking on responsibility

To be an effective project manager, you must have a balance of task- and people-related skills. While your ultimate goal is to deliver a result, success comes from building diverse individuals into a strong team and motivating them to produce quality results within the requisite timeframes. Often you will achieve this through personal determination, creativity, and powers of persuasion. At a deeper level, you also need the moral courage and integrity to treat

every member of the team the same, irrespective of their seniority and personality. You also need excellent time management and personal organization, so that you can think beyond immediate distractions or crises to provide proactive leadership to other members of the team. While it is important to have at least some understanding of the technical aspects of the project, your management role is to provide the decision-making, planning, and leadership skills outlined in this book.



CHECKLIST...

Am I ready to manage this project?

YES NO

- 1 Do I have a **clear idea** of who the end users are in my project and what the world looks like through their eyes? ☐ ☐
- 2 Do I **understand what is required** of this project and why? ☐ ☐
- 3 Do I **care about the outcome** enough to make personal sacrifices to achieve it? ☐ ☐
- 4 Am I **confident I can deliver** it given the constraints of cost and time? ☐ ☐
- 5 Am I **prepared to take risks** and back my own judgment where necessary? ☐ ☐



Working with your sponsor

The relationship between the project manager and the sponsor is the foundation upon which the whole project is built. Both must have the same understanding of what constitutes success and should have established a relationship of trust that enables each to share issues and concerns with the other as soon as they crop up.

Engaging the sponsor

Your sponsor should be the individual (rather than the group, committee, or team) who owns the resources required to make the project successful and will act as the final arbiter of success. This will be based partly on hierarchical seniority and partly on personal authority. Effective sponsorship is one of the key determinants of your success, so a wise project manager invests time and effort, first, in selecting the right person—if you have a choice—second, in forging the right relationship, and third, in providing the sponsor with the information and arguments he or she needs to defend or champion the project as necessary.

Meeting your sponsor

Your first meeting with the sponsor of your project is a key moment of influence. This meeting should not be just about the detail of the project, but it should also establish how you and the sponsor will work together to make the project succeed.

Give high priority to agreeing on the communication channels and escalation procedures—these will outline how and when to involve the sponsor when things go wrong. In larger projects, key team members such as a senior user or technical specialist may also be invited to attend this initial meeting with the sponsor.

In focus

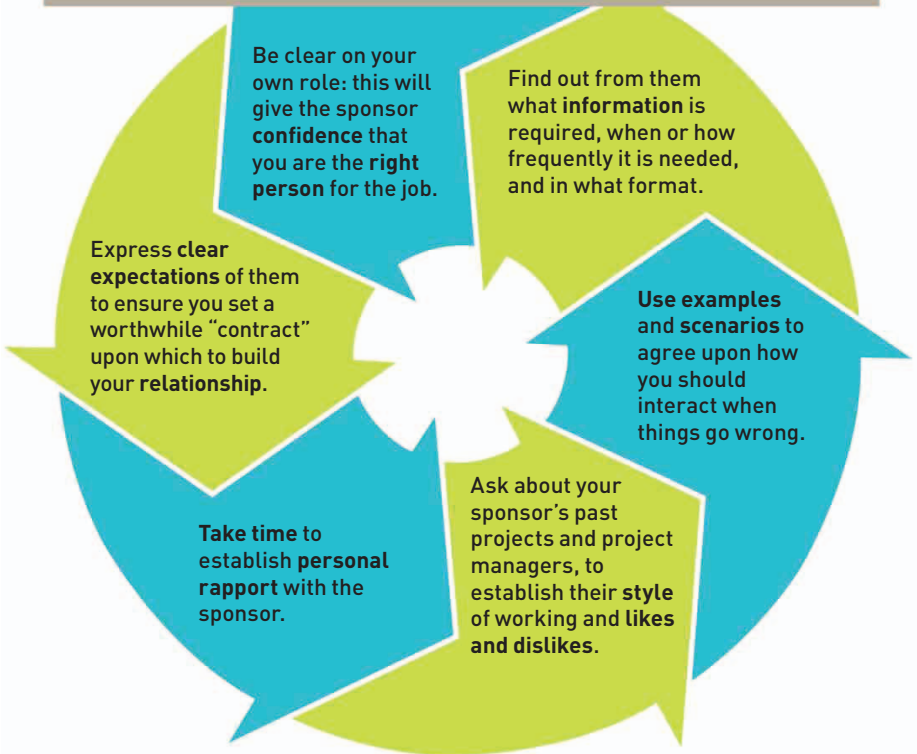


CHOOSING YOUR OWN PROJECT SPONSOR

If you are in a position to choose your sponsor, your goal should be to achieve just the right balance between authority and accessibility. While it is generally helpful to have as senior a sponsor as possible, you also need someone for whom the project is significant enough to command their active interest. A sponsor who keeps up to date

with your progress and is aware of potential or actual issues will be well placed to make decisions or help you overcome any opposition or obstacle to the project without the need for extensive briefing. You need to be able to consult your sponsor quickly when things go wrong and feel comfortable that you are more than just one commitment among many.

How to forge a good sponsor-manager relationship



Identifying poor sponsorship

Beware the sponsor who cancels or postpones your meetings at short notice, or who fails to get your project on to the agenda of key decision-making meetings. Quickness to apportion blame, or to get unnecessarily embroiled in detail, are other indications that your sponsor has become detached from the goals and progress of your project. Think very carefully about what you should do and who you might speak to if your sponsor's lack of engagement starts to threaten the success of your project.

Tip

AVOID SURPRISES

Never try to hide things that have gone wrong from **your sponsor**—even if this means admitting a serious mistake on your part.



Documenting progress

Standard documents and agreed upon circulation and sign-off procedures increase the efficiency of project teams and improve communication, particularly between sponsor and manager. If your organization does not yet have a standard set of project documents, you can enhance your reputation considerably by producing your own.

Designing documentation

Having a suite of carefully designed project documents allows information to be carried over from one project milestone to the next—or even transferred from project to project—and helps occasional stakeholders find information quickly within a particular document. Simple formats work best and should incorporate a cover sheet identifying the document, the project to which it refers, and the key stakeholders involved. Never underestimate presentation: people are quick to judge based on first impressions, and if your paperwork looks professional, they will treat you as such unless you subsequently prove otherwise.

Key project documents

Each of the six phases of your project requires different documentation to record important details. Depending on the size and nature of your project, these may include:

Tip

INVEST TIME EARLY ON

It is often difficult to **find the time** in a busy schedule to develop and **manage** project paperwork, but a little time spent **considering documentation** early on will get your project off on the right foot.



Using document sign-offs

The practice of physically signing off on documents is a very useful way to get people to take a project seriously. However, any decision about whether to use it needs to be sensitive to the culture of your organization: if people are generally good at engaging with projects and delivering on promises, then asking for signatures may be seen as unnecessarily aggressive. If this is not the case and a firmer line is required, implementing a policy of signing off on documents is most easily achieved if you employ it from the start, with all document formats having space for signatures.

INITIATION PHASE

Mandate: agreement on the need for the project and its goals.

Brief: a description of the issue to be resolved or the opportunity to be exploited.

01

DEFINITION PHASE

Project Initiation Document (PID): defines what the project must deliver and why.

Business case: the financial figures behind the opportunity.

Risk log: a record of all risks and approaches to resolution.

02

PLANNING PHASE

Schedule and resource plans: the plan in detail, including completion dates and resource requirements.

Quality plan: what processes will be monitored, and how.

03

CONTROL PHASE

Changes to scope: agreed to modifications on the original brief.

Milestone reviews: progress against schedule and budget.

Quality reviews: confirmation that processes are being followed.

04

IMPLEMENTATION PHASE

User Acceptance Test (UAT): reports and sign-offs from end users at all levels.

Implementation schedule: the plan for how the project will be handed over to end users.

05

REVIEW PHASE

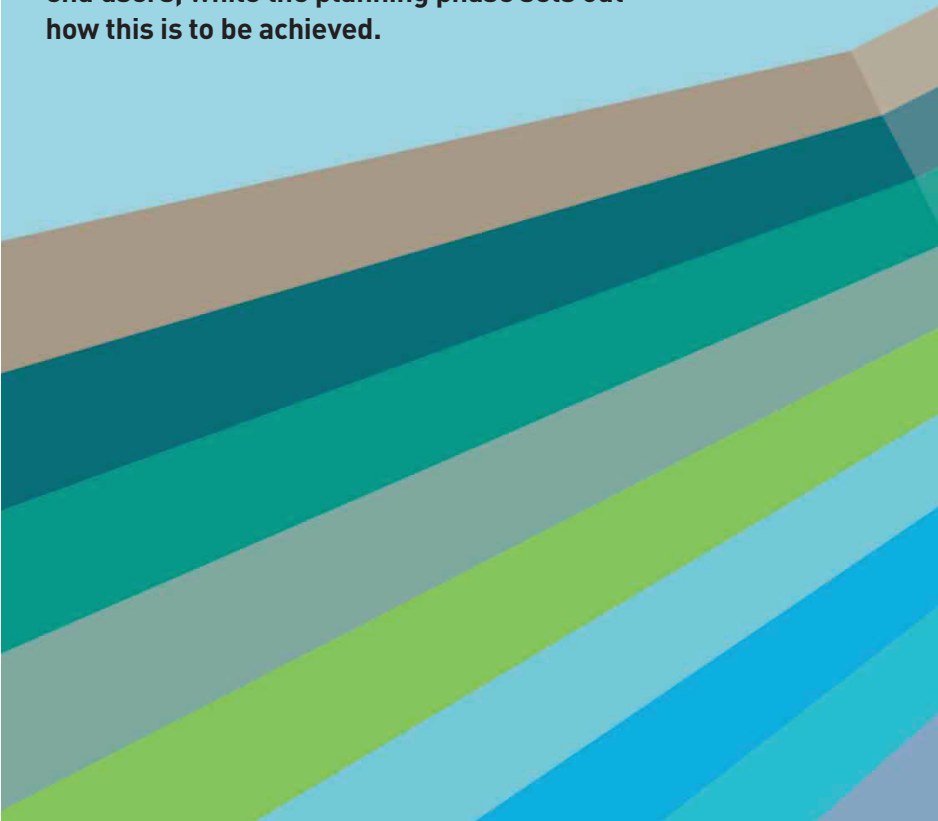
Post-implementation review: assesses what the project has delivered.

Lessons learned review: how things could have been done better.

06

Setting up a project

A successful project depends on clear thinking in the preparatory stages. The initiation and definition phases of the project management process build on each other to establish precisely what the project is expected to deliver to the end users, while the planning phase sets out how this is to be achieved.



02

- 28 | INITIATING THE PROJECT
- 30 | BUILDING A PROJECT TEAM
- 32 | ANALYZING STAKEHOLDERS
- 34 | DEFINING THE DETAILS
- 40 | DEVELOPING A BUSINESS PLAN
- 42 | MANAGING RISK
- 44 | PLANNING THE PROJECT
- 50 | ESTIMATING TIME
- 52 | REPRESENTING THE PLAN

Initiating the project

The goal of the initiation phase is to set out the reasons for a project and the context in which it will run. As project manager, your goal in this phase is to secure the briefing, backing, and resources you need from your sponsor to begin a detailed evaluation of the work to be done.

Agreeing on the brief

The first step in the initiation phase is to establish that both you and your sponsor view success in the same terms—both the result to be achieved and the way you will work together to achieve it. Based on these discussions the project mandate and brief can be drawn up. These should document, respectively, the business opportunity or issue to be addressed, and some outline thoughts on how this might best be done. The initiation phase should end with the sponsor signing off on the brief and allocating resources that allow you to move into the definition and planning phases of your project.

Establish that both **you** and **your sponsor view success** in the **same terms**—both the **result** to be achieved and the way you will **work together**

Getting the right support

The type of support you need from your sponsor during this phase will to a degree be dependent on where the idea for the project came from.

- **Top-down initiation** In most organizations, targets for future development and plans for a variety of initiatives become projects undertaken by operational managers. In this kind of “top-down” initiation, the sponsor delegates the execution of the project to you. This is a critical point for you: do not let nerves or excitement cloud your judgment of what you need at this stage. You can expect strong support from above, but need to secure a very clear briefing of what is expected from the project.





80%

of project managers have
executive sponsorship

• **Bottom-up initiation** Not all the best ideas come from those at the top of an organization; those closest to the customer may be the first to spot commercial opportunities. Successful projects initiated from the “bottom up,” by people who end up managing them, indicate a very healthy corporate culture. It shows that those at more junior levels are having initiative rewarded with real responsibility—and this represents an opportunity that should be seized. Your advantage in this case is that you will be highly motivated, with a very clear idea of what you want to achieve and how this could be made possible. Your priority is to obtain solid support from a sponsor who is fully behind the project so that you can go on to deliver results that justify his or her confidence in you.

In focus

PITCHING YOUR OWN PROJECT

If you identify an opportunity requiring more resources than you personally can muster, your first step should be to target a suitable sponsor and pitch your idea. Your presentation should identify the size of the opportunity and be supported by hard evidence. Think about the questions your sponsor might ask. Prepare well: there are unknowns and risks in any project, so your sponsor's decision will be based as much on your credibility as on the strength of the idea. Even if you do not get sponsorship for this idea, you can enhance your prospects of getting future projects sponsored if you have put a well-argued case forward.

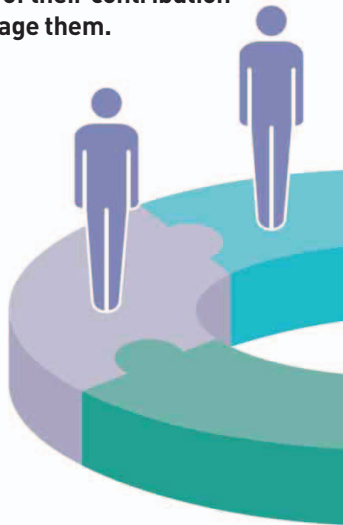
Your priority is to obtain
solid support from a
sponsor who is **fully**
behind the project

Building a project team

One of the most important functions of the project manager is to build and maintain the “team dynamic.” By giving your project a strong and positive identity, and making the team a rewarding environment in which to work, you increase the likelihood that people will give you that “extra 10 percent” that dramatically increases the quality of their contribution and reduces the amount of effort it takes to manage them.

Putting a team together

An effective project manager builds a team with a strong sense of identity. This is often more challenging in a small team than in one with a higher profile and fully dedicated team members. Start by taking time to select the right people, with input from the sponsor (see pp.18–19). Base your decisions on availability and relevant skills/knowledge/contacts, but also take personality “fit” and motivation into account. Stakeholder analysis (described overleaf) can be a useful tool for assessing potential candidates and finding the best way to manage them. Make a personal approach to each person selected and request their participation. Don’t beg; simply explain why you have selected them and the benefits they can expect for being involved.



Getting started

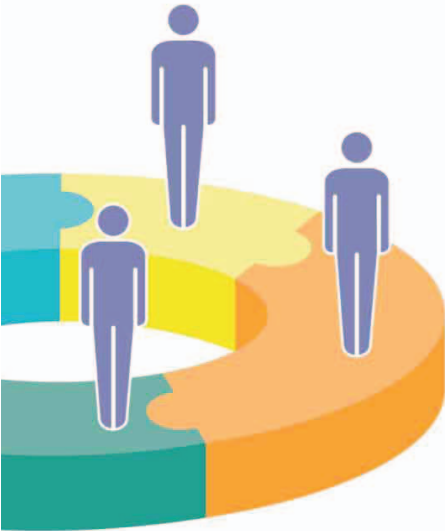
Hold an initial meeting with all project team members. It is helpful to have the sponsor present for a proportion of a “kickoff” meeting, but you will enhance your authority as the project manager if you are the one to arrange and chair the meeting. (If you do not have the authority to do this, you may struggle to manage the group through the rest of the project.)

Discuss team roles and ground rules for your project before getting into the detail of the task to be undertaken. People appreciate being asked about their experience of project teamwork. Find out

whether there is anything your team members particularly like or dislike, and what their hopes and concerns are. Talk with the group about how project decisions (particularly in relation to deadlines) will be made. Discuss how the team will acknowledge success; what to do if people fail to deliver; and how any possible conflicts will be resolved.

7

key roles in a project team may be filled with fewer people



Developing identity

A strong team is built on a strong identity. Give your project a name, but beware of choosing anything too clever—the best names are generally low key, with positive connotations, offering a useful shorthand reference for the project. Create a team location, be it a building, room, desk, or notice board, or a virtual location on the intranet or web. Make it somewhere that information can be displayed and progress checked, and give people reasons to frequent it.

Select the **right people**, with input from the **sponsor**

Members of your team will take greater “ownership” of your project if they feel as if they are an important part of it. Involve them in production of the work schedule, risk analysis, and problem solving. Establish the “soft” success criteria, relating to teamwork, morale, personal behavior, and learning, in addition to the hard criteria set out in your project definition.

CHECKLIST...

Creating a strong team

YES NO

- | | | |
|--|--------------------------|--------------------------|
| 1 Do my team know one another? | ☐ | ☐ |
| 2 Do they respect one another? | ☐ | ☐ |
| 3 Do they know how their roles fit together? | ☐ | ☐ |
| 4 Have they agreed on the standards to which they will hold one another accountable? | ☐ | ☐ |
| 5 Do they acknowledge my role as project manager? | ☐ | ☐ |



Analyzing stakeholders

The various stakeholders in your project—from the sponsor to each individual internal team member—all view it from very different perspectives. Analysis of each stakeholder's attitude toward your project, and degree of influence within it, can be a useful part of the process by which a team is put together and managed.

Identifying key players

All projects have multiple stakeholders. Some will be more important than others, either because of their involvement in delivering elements of the work, or because they are influential in the environment where the work is being produced or will be deployed.

Stakeholder analysis allows you to identify the most important people in your project and decide where to invest time and resources. It should lead to a communication plan aimed initially at canvassing opinion and then providing the right people with timely information throughout the project's lifecycle.

Stakeholder analysis allows you to identify important people and decide where to invest **time** and **resources**

Performing the analysis

Consider every stakeholder in your project in relation to two scales—**influence** and **attitude**. Rate each person or group according to their influence within the project, and whether they can be influenced by you as the project manager. Next, rate them on their attitude toward the project. Use the matrix on the facing page to mark the desired and actual position of stakeholders. The blue figures show the current positions of stakeholders you wish were more committed, so consider what you need to do to improve the situation. The red figure is neutral, but is unlikely to be influenced by you, so does not require action.

INFLUENCE

Significant influence;
cannot always be
influenced by you

Marginal influence;
cannot always be
influenced by you

Influence equal
to you

Significant influence;
can be influenced
by you

Marginal influence;
can be influenced
by you

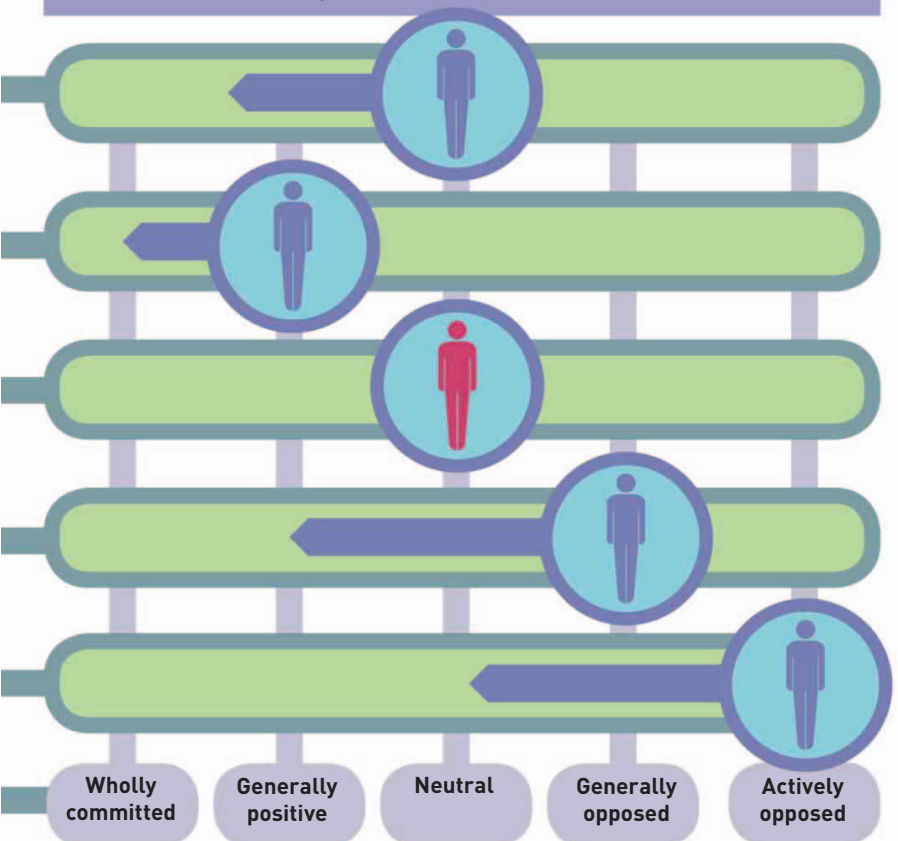
ATTITUDE

Influencing stakeholders

As a general rule, you are unlikely to be able to move strongly negative stakeholders to the positive side, but it may be possible to neutralize their opposition. Where there is opposition from an especially powerful stakeholder or group of stakeholders, steps may have to be taken to reduce their influence or

the project may have to be abandoned. Your relationship with the sponsor, and his or her position in your organization, may be very helpful. You need to have the confidence to address senior or challenging stakeholders directly, but also the wisdom to know when this may be counterproductive and a situation is better addressed by involving the sponsor.

Stakeholder analysis matrix



Defining the details

Before committing significant resources, you must have agreement on what your project should produce, by when, and using what resources. While the brief should have identified the rationale and broad strategy behind a project, the next step is to define the scope of the project—precisely what will be handed over to the end users on completion.

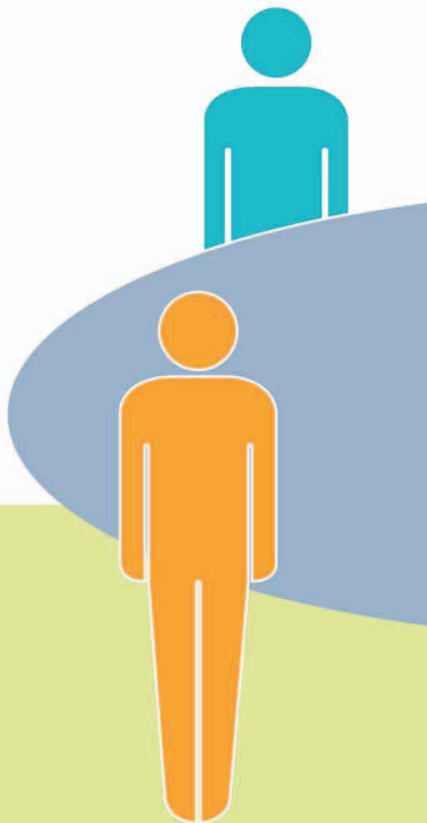
Asking for input

In broad terms, defining the scope of your project is done by asking the right people the right questions in the right way, and recording your findings clearly. Consider the most important players in your project, identified in your stakeholder analysis: which of these have key roles in defining what the project must deliver? Time invested discussing the project brief with stakeholders, particularly the client and end users, is rarely wasted. The views of the sponsor are a good starting point—if your project required an initiation phase, you will have already obtained these from the mandate and the brief.

Tip

ASK “GREAT QUESTIONS”

Think carefully about the questions you ask your **client**. If you can get him or her to say “**That’s a great question!**” you will have helped uncover a **new perspective** and transformed your **status** from supplier to **partner**.



Speaking directly

Clients and end users should have significant input into the scope of your project, but also consider those people with whom they interact, such as anyone who manages the end users or who will support them in areas relating to your project after implementation. It may also be helpful to speak to anyone who will be responsible for maintaining the product, capability, or facility that your project will deliver.

92%
of **attendees value meetings** where they can **contribute**



Defining the **scope** of your **project** is done by asking the **right people** the **right questions** in the **right way**

Time invested **discussing** the project brief with stakeholders is rarely wasted.

Gathering information

Focused and well-structured conversations not only deliver useful information from stakeholders, but can also build your credibility with the client. Generally speaking, it is best to have these discussions face-to-face, because this allows you to assess each person's understanding of, and commitment to, the project. Although your primary purpose is to uncover the information you need to create a clear scope, in-depth questioning often exposes hitherto unexplored aspects of people's work to scrutiny. This can sometimes be resented, so tread carefully, but be courageous enough to continue lines of questioning that are uncovering useful information.

43%
of **organizations** on
average have suffered a
recent **project failure**



In-depth questioning often
exposes hitherto unexplored
aspects of people's work to
scrutiny, but **be courageous**
enough to **continue lines**
of questioning that are
uncovering **useful information**

Understanding your client

Your first goal should be to establish how well your client understands the situation surrounding your project and the benefit they expect it to deliver. Inexperienced project managers sometimes make the mistake of trying to zero in too quickly on what the client sees as the essential and desirable

features of the end product. In cases where the client does not know what he or she wants, avoid asking direct questions about the scope, which is likely to confuse and could lead to frustration, embarrassment, and conflict. This would not be the ideal start to a crucial relationship that should become a central axis of the project team.

Asking the right questions to define the scope

HOW?

- How will it be used?
- How long will it be in service?

WHERE?

- Where will it be used?
Physically, and in what context?
- Where is this in our list of priorities?

WHO?

- Who are the end users?
- Who will support it?
- Who will manage it?

WHEN?

- When will it be used?

WHY?

- Why is the result required?
- Why doesn't it exist already?

WHAT?

- What is the problem to be fixed?
- What would be the impact of not fixing it?
- What exactly is the result required?
- What has been tried before?

CHECKLIST...

Understanding the scope of your project		YES	NO
1	Do you have a clear idea of the objective of your project —what it is intended to achieve?	☐	☐
2	Do you know why this is important ?	☐	☐
3	Do you know how and when it will be achieved ?	☐	☐
4	Have you determined who will be involved?	☐	☐
5	Have you identified the deliverables for your project?	☐	☐
6	Have you obtained enough information to allow your sponsor to make a decision on whether to proceed?	☐	☐

Prioritizing features

In most projects, as you go through the definition process you will identify a number of features required of the end result. Some will be essential, while others are “nice to have.” In order to highlight where clashes exist, take each feature in turn and create designs based on that alone; then consider the results with the client and develop a definition that delivers the perfect mix of features to the end user.

5 steps should lead to one of your organization’s key goals

Tip



CREATE A BOTTOM LINE

Set a “Fit for Purpose Baseline”—the minimum that your project can **deliver** and still be deemed a **success**.



Adding creativity

As part of the definition phase of your project, it is always worth considering how it could be transformed from delivering a “fit for purpose” solution to being a project that catches the eye for creativity and elegance. This need not take much time; the main thing is to suspend judgment on ideas and have some fun. Then change your mindset and assess what additional perspectives your creative musings have uncovered. Try to identify more than one option—even when there is an obvious solution. Take time to consider at least three possible approaches (one of these might be “do nothing”). Your goal should be to find one way to make your project exciting and different for your end users or for your team.

Recording the scope

The investigations you undertake during the definition phase are to enable you to generate a detailed Project Information Document (PID). This is an expansion of the brief, incorporating all the additional information you have gathered from discussions with stakeholders. The PID is the document on which the sponsor will make a decision on whether to commit significant resources to the project. Once signed off, it becomes a binding agreement between the sponsor, the project manager, and the client, so its format and content are of paramount importance. The information in the PID needs to be easily accessible, so don't include more than is necessary for the size and complexity of your project.

THE FIVE WHYS

A simple but surprisingly powerful technique for establishing the

link between a project and your organization's key strategic objectives is to ask the client why they want what the project delivers. Insist that they answer this question beginning with the words “in order to.” Then

take the answer they give and ask them why that is important; again, insist on “in order to.” Repeat this process for as many times as it takes to connect your project to your organization's main business strategy. As a rule of thumb, if the sequence of questioning does not lead to one of your organization's strategic goals within five steps, then the project may not be worth pursuing.

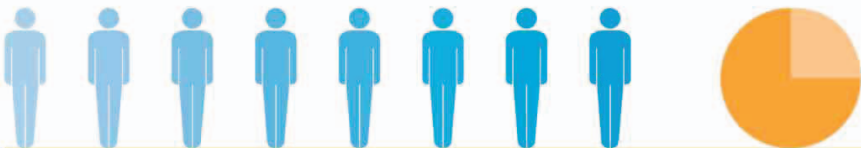
Developing a business plan

Every project will represent an investment in time, effort, and resources, so a key question to address during the definition phase is: “Is this project worth it?” The business plan for a project weighs two factors: the cost of undertaking the project and the benefits it is likely to deliver.

Weighing up costs

When assessing the potential costs of your project, make sure you only take future costs into account—past expenditures are irrelevant in deciding whether to take the project forward. Only include incremental costs in your assessment: those that change as a result of the project being undertaken. For example, if your project requires that you hire two extra staff members but is

running from company offices, the additional staff costs should be included but the accommodation costs should not. Your assessment should include any costs relating to the involvement of your internal team—often known as an invisible cost since no money changes hands—and out-of-pocket costs, which are those that will be paid outside your organization, such as the cost of materials or subcontracted services.



71%

of **projects** that are **aligned**
with an organization's **strategic**
goals **succeed**



GETTING THE BUSINESS PLAN RIGHT

Do's

- Using the sponsor's financial advisors to put together your business plan
- Setting a notional hourly rate for work done by internal team members, especially technical specialists
- Including contingency funds in your cost assessment, to allow for unexpected outlays

Don'ts

- Basing your business plan on your own gut feelings and untested assumptions
- Considering internal team costs a "free" resource when additional or unplanned work has to be done
- Deciding to ignore potential risks and take the chance that nothing will go wrong



Tip



KNOW YOUR STUFF

Work with **experts** to put your **business plan** together, but make sure you understand the basis on which they have done this well enough to **form a view** on what they have produced.

Assessing benefits

While it is often easy to identify the "change" your project will deliver, it may be more difficult to quantify the nature, scale, and timing of the benefit. As a rule, the benefits from a project should be aligned with at least one of the organization's strategic goals (such as increasing revenue or reducing costs, for example) if it is to proceed. Consider also the point at which the benefits can be expected. In some cases, a smaller return earlier is preferable to a larger one that will take longer to come in.

Projected benefits can rarely be guaranteed and so any complete cost/benefit analysis should contain an assessment of what could go wrong and the effect of this on the overall outcome. While your goal should be to put a percentage figure on the likelihood of the project delivering the intended benefit, this is always a judgment based on incomplete information. In the end, it is your sponsor's job to make the decision, but it must be based on accurate information provided by you.

Managing risk

Projects, by their nature, are risky, so it could therefore be argued that your key role as a project manager is to identify, plan for, and manage risk. Risk analysis is undertaken in the definition phase, but should be followed by a continuous cycle of management and analysis throughout the control and implementation phases of your project.

Planning for risk

Initial identification of risk often takes the form of a Risk Workshop—a group of people getting together with the express purpose of identifying and evaluating all the risks in a particular project or phase. From that point on every review meeting should contain an agenda item on “open” or “live” risks. As a project manager, the risks you should be most concerned with are those that will have an impact on one of the three project parameters (time, cost, or quality).

Risks need to be evaluated with respect to two criteria: probability (how likely they are to happen) and impact (how serious it would be if they do). Most tasks in your project will contain some element of risk, so you will need to set a threshold at which you are going to begin to plan.

2.5%

of companies in one
survey **completed**
100% of their projects

Dealing with risk

These are the five ways of dealing with risk, as outlined in the international project management standard PRINCE2 (see p.12).

Recording risk

For tasks that carry a risk that is above your threshold for probability and impact, identify a response in advance and monitor progress toward project completion more carefully than usual.

In all but the smallest projects, record risks in a risk logbook. This document should describe each risk, its impact and probability, and countermeasures to deal with it. It can also include the proximity of the risk (when it will need active management) and any early indicators that the probability of the risk has changed. The contents of the risk logbook should be reviewed throughout the life cycle of the project.

PLAN CONTINGENCY

Have a **Plan B** that will achieve the same **result** by a different route and leave future plans intact.

PREVENT

Terminate the risk by **doing things differently**. This is not always a realistic possibility.

REDUCE

Take action to reduce either the likelihood or impact of the risk.

TRANSFER

See if you can **spread the risk** so that the consequences become less serious (this is the principle on which insurance works).

ACCEPT

There are some risks that are considered **acceptable** because the cost of dealing with them is **greater** than the **increased benefit** one would get from having to develop countermeasures.

Risks need to be **evaluated** with respect to **two criteria**: probability and impact

Planning the project

Producing an accurate and detailed plan is one of the project manager's most important responsibilities. However, do not make the mistake of thinking you should do it on your own. By involving team members in the planning process you increase their understanding of what has to be done and often gain an extra level of commitment to deadlines.

Developing a project plan

The following 10-step Team Planning technique uses sticky notes and a flip chart to produce a project plan. By following the process outlined, you will produce a robust and accurate project plan and maximize buy-in from those who will be instrumental in delivering it. Do the first four steps in this process on your own, getting the team involved once you have some raw material for them to work on. This reduces the cost of planning and makes briefing easier since you have something to show them.



101

Restate the objective

Start by reducing the **objective** of your project—defined in the **initiation and definition** process—into a single statement of intent that fits on one large sticky note.

Tip**USE COLOR**

Choose a **different color** of sticky note for the objective, the products, and the tasks of your project (here, orange, pink, and yellow, respectively) to give at-a-glance **clarity to your plan**.

| 02

Brainstorm about the products

The products of a plan are the **building blocks** that, when added together, **deliver** that project's **end result**.

Come up with between five and 15 products for your project on separate sticky notes and place them in roughly chronological order down the short side of a piece of large flipchart paper.

| 03

Brainstorm about the tasks

Tasks are **activities** or **actions** undertaken by individuals or groups that normally require their presence or participation for the whole duration.

Take a pack of sticky notes in a different color from the one you used to set out the products. Have a brainstorming session on the tasks that need to be done to deliver each product, writing one task per sticky note. Draw two fields on the bottom half of the sticky note, so that you can add additional information later.

| 04

Place the tasks in order

Place the tasks in roughly **chronological order** across the page, keeping them in line with the product to which they are connected. Where tasks can be done **simultaneously**, place them below one another, and where they depend on one another or on using the same resources, place them **sequentially**.

Involve the rest of the delivery team in adding to and **refining** this skeleton plan.

32% of the **reasons for project failure** rest in **poor estimation** in the **planning phase**

| 05

Confirm the tasks

Step back and look at the logic flow of your plan. Involve the implementation team in this step—it can be a useful “reality check” on your logic. When people identify modifications to your plan, listen carefully and incorporate their suggestions, changing or adding sticky notes as necessary.

| 06

Draw in dependencies between tasks

A dependency is the relationship between two tasks. The most common type of dependency is end-start (one task ending before the next can start). Dependency can be based either on logic or on resource.

Once you have confirmed that all tasks are represented and that they are in the right places, take a pen and draw in arrows to represent the dependencies between the tasks required to complete your project.

| 07

Allocate times to tasks

Use the experience of your project team to identify what resources and how much effort will be required to complete each task. Note: this is not how long people need to complete the task (“Calendar time”), but how much effort they will need to put in (“Timesheet time”). Write the time needed for each task into the bottom right-hand field on each sticky note. Where possible, use the same unit of time throughout.

Once you have confirmed that **all tasks are represented** and that they are in the right places, take a pen and **draw arrows** to represent the **dependencies between the tasks**

08

Assess and resolve risks

Get input from every member of the project team on what they consider to be risks. Give each member of the team two or three sticky notes of a different color from the ones you have already used, and get them to place them behind the tasks they consider riskiest. Once everyone has placed their notes, facilitate a discussion around their choices, agreeing on what countermeasures to adopt and who will be responsible for them.

09

Allocate tasks

Get your team together and allocate who will do what. People who have been allowed to contribute to the plan in the ways described in steps five to eight will generally have already identified the tasks they would like to work on, or at least recognized that they are the best person to do certain tasks even if they don't want to do them. Simply introduce this step by saying to your team: "Now, who's going to do what?" and then wait for a response. You may be greeted with silence at first, but gradually people will begin to volunteer for tasks. Record names or initials in the bottom left-hand corner of each sticky note.

10

Agree on milestones and review points

Take sticky notes of the same color as those that you used for the products of your project and place one at the end of each line of tasks.

Now facilitate a discussion about when people will be able to complete their tasks and write specific dates (and possibly even times) for when you will review progress. If your project is time-critical, begin with the deadline and work back toward the present; if quality or cost are critical, begin at the present and work forward. Make sure that people cross-check their deadlines with other work or life commitments.

Example of a project plan

In this example, the project is to create a report containing the necessary information for a marketing director to allocate her budget for the coming year. It contains three main stages, and a number of smaller steps that need to take place within this framework. As is often the case in projects, various processes need to take place concurrently as well as consecutively.

PROJECT OBJECTIVE

Total time: 32 hours

Deliver: Market analysis plus recommendations

To: Marketing director

In order to: Allow her to decide how to spend next year's budget

INTERNAL REVIEW UNDERTAKEN

Meet with marketing director to confirm strategic priorities

Alan

4 hours

Complete desk research

Alan,
Sam

8 hours

MARKET RESEARCH CONDUCTED

Select market research agency

Dawn

5 hours

REPORT PRODUCED

Write background section of report

Alan

4 hours

30%

of projects on average take **longer to complete** than the amount of time originally estimated



Conduct market research

Agency	2 weeks (lapsed time)
--------	--------------------------

Analyze market-research findings and decide on key recommendations

Alan, Sam, Dawn	6 hours
-----------------------	---------

Write final draft report and prepare presentation

Alan	4 hours
------	---------

Present to marketing director

Alan, Sam	1 hour
--------------	--------

Estimating time

Being able to estimate the amount of time required for the tasks and activities of a project is a key skill for any project manager. Indeed, in smaller projects that do not have an explicit budget, keeping on schedule is likely to be one of the measures of your effectiveness as project manager.

Getting schedules right

In most cases, estimating task times with any degree of accuracy requires a combination of experience and common sense. However, this presupposes that you have correctly identified the task. When projects are late, it is often because activities have not been thought through or recorded properly, so what seemed like a very straightforward task (such as getting a decision from the finance department, for example) gets estimated as a single event rather than a number of small but significant and connected steps, each taking time and effort.

Involving the team

In most small projects, and certainly where many projects run side by side, the challenge is not to estimate how much effort tasks will take, but how much time someone needs to complete a task alongside their other work. Involve team members who will be performing critical tasks in your decision-making process. Ask each person for their estimate of the amount of time they will need to be able to complete a certain task, given their other commitments. Be prepared to challenge these estimates if you disagree, but beware of putting undue pressure on people to reduce them.

How to estimate the time required

Break down tasks until you know precisely who is doing what.

Ask people how long it will take to perform their tasks.

Seek advice from those that have done similar tasks before.

Use a time estimation formula.

Using time estimation formulae

Different organizations, industries, and sectors employ different models or formulae to estimate time. At first glance they always seem mathematical, but in most cases their effectiveness is psychological—either overcoming aversion to estimating, or encouraging more careful thought in those who tend to rush in.

Perhaps the most widely known is the PERT formula (Project Evaluation and Review Technique). To use PERT you need three estimates of the time it could take to complete a task or activity:

- The most likely time required (T_m)
- The most optimistic time assessment (T_o)
- The most pessimistic time assessment (T_p)

Use the following formula to estimate the most probable duration for that activity (T_e):

$$T_e = \frac{T_o + 4T_m + T_p}{6}$$

The formula can be weighted toward pessimism—if the consequences of a late completion of a particular task are severe, for example—by reducing the T_m multiplier and adding a T_p multiplier:

$$T_e = \frac{T_o + 3T_m + 2T_p}{6}$$



Representing the plan

Once created, your project plan should become your main point of reference for managing progress during the control phase of the project. It is a living document, and you should expect that it will be updated through several versions to keep up with changing circumstances and to take into account incorrect estimates of time or cost.

Making a digital record

For most projects, you will need to select a software package that is most suited to your needs. The correct system should be easy to use and to share with others. Most systems will allow you to calculate items automatically, such as overall cost, critical path duration, and resource requirements. The right system will convert a single plan into a number of formats so that different aspects of the project are highlighted. In addition, the impact of changes or variances can more easily be tested, and multiple versions can be held for comparison.

There are many types of software packages available, each with its own strengths and weaknesses. Choosing the right system for your requirements will depend on the size and complexity of your project, the experience of the project team, and the software to which they all have access. As a general rule, you should ensure that managing the software system you choose will not get in the way of managing the project itself. In addition, make sure that all team members will have first-hand access to the sections of the plan relevant to their work.

ASK YOURSELF...

What are my requirements?

YES NO

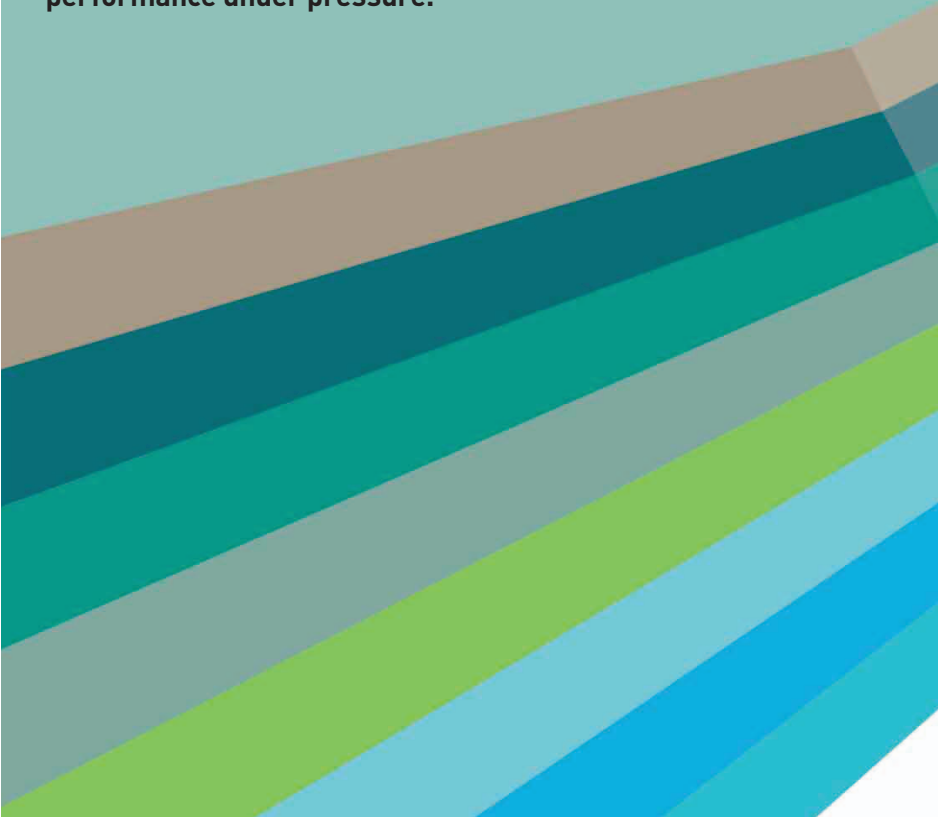
- | | | |
|--|--------------------------|--------------------------|
| 1 What aspects of the plan will I need to analyze and when? | ☐ | ☐ |
| 2 In what circumstances will I need to present or discuss the plan? | ☐ | ☐ |
| 3 How often will it need updating ? | ☐ | ☐ |
| 4 Who else needs to have access to the plan?..... | ☐ | ☐ |
| 5 Have you identified the deliverables for your project? | ☐ | ☐ |
| 6 What representation will be most easily accessible and understood by them? | ☐ | ☐ |

Choosing software

SOFTWARE PACKAGE TYPE	STRENGTHS	WEAKNESSES
Specialized project management software Ideal for a specialized project environment where people are familiar with its use can intuitively read all formats and representations.	○ Show multiple plans ○ Longer-term scheduling possible ○ Shows dependencies between tasks ○ Integrates schedule, budget, and resource plans ○ Calculates critical path and resources	○ “Occasional” project managers may spend a lot of time learning to use the software ○ Oversophisticated for small projects ○ Does not readily integrate project and day-to-day work
Spreadsheet software Useful for simpler, smaller projects and where managing a budget is important.	○ Widely available ○ Flexible for smaller projects ○ Calculation of durations and costs ○ Representation of tasks as graphs	○ Requires specialized knowledge to represent more complex information ○ Does not readily integrate project and day-to-day work
Graphics packages Good for presenting the plan to project stakeholders as a presentation and for highlighting the relationships between tasks.	○ Professional plan representation ○ Multiple options to show responsibilities products, and tasks ○ Project templates available in many packages	○ Not universally available for all stakeholders ○ Limited tie-in with diary or financial packages, schedules/ budgets require manual updating
Datebook and tasklist software Ideal for a multiproject environment or where people have to integrate project work with day-to-day business; and for small projects with no cash budget.	○ Integration of project and daily work ○ Good at representing the schedule ○ Widely available ○ A familiar format for most project stakeholders	○ Not good at showing critical path, resource plans, or budgets ○ No automatic tie-in with budgeting software ○ Does not show the relationships between tasks graphically

Managing work in progress

Management during the control phase, once a project is underway, requires a sophisticated skill-set that includes team leadership, delegation and communication, budget and schedule management, and high performance under pressure.

An abstract graphic at the bottom of the page consists of several parallel diagonal stripes. The stripes are in various shades of teal, blue, and green, creating a sense of movement and depth. The stripes originate from the left side and extend towards the right, with some overlapping each other.

56 | **MAKING TIME FOR
THE PROJECT**

58 | **DELEGATING EFFECTIVELY**

62 | **MAINTAINING MOMENTUM**

66 | **COMMUNICATING
SUCCESSFULLY**

68 | **REVIEWING PROGRESS**

70 | **MANAGING PROJECT
INFORMATION**

72 | **MONITORING COSTS**

74 | **MANAGING CHANGES
TO SCOPE**

03

Making time for the project

Project management is rarely a full-time role, except in large or specialized organizations. Finding time for your longer-term work is often one of the biggest challenges faced by managers of smaller projects, especially when the planning stage ends and hands-on work begins.

Recognizing your priorities

Most modern approaches to time management address our tendency to prioritize urgency over importance when deciding what to do on a day-to-day basis. While the ability to react to unforeseen events and problems is essential, being purely “reactive” damages productivity, reduces the quality of results, and, not least, is stressful for you.

As a project manager your focus has to be farther ahead than the immediate; hence, the emphasis on definition and planning, on proactive communication with all stakeholders, and on risk analysis.

Tip



GET ORGANIZED

Plan regular two-hour slots of **project time** in your datebook. Set yourself a **specific task** to do in that time one week ahead, and then **prepare** as you would for an exam, gathering the information and resources you need to **complete** the task **successfully**.

CHECKLIST...



Managing your time

YES NO

- 1 Do you allocate “**interruption-free**” time in your datebook, when you get away from your desk and turn off your email and phone, for tasks that require uninterrupted thought? ☐ ☐
- 2 Do you **factor reactive time**—spent responding to emails and phonecalls and attending ad-hoc meetings—into your **day-to-day planning**? ☐ ☐
- 3 Do you discourage reactive **requests**? ☐ ☐
- 4 Do you **delegate** work early and **effectively**? ☐ ☐
- 5 Do you ensure, where possible, that meetings begin **on time** and stick to the **agenda**? ☐ ☐

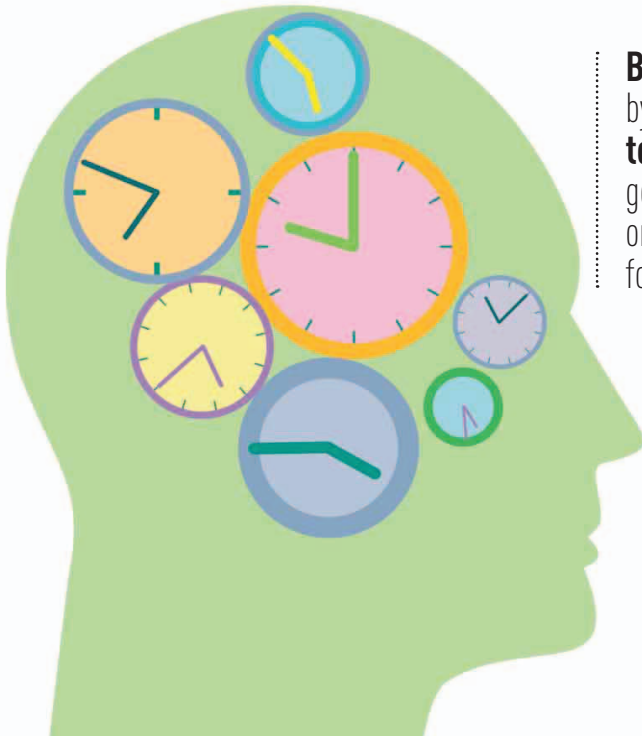
Finding your focus

Finding time to focus on the big picture is the key to integrating your long-term role and responsibilities with the short-term demands of your project.

- Start with a plan: begin every day by spending five to ten minutes getting a handle on your agenda for that day. Identify time already allocated to meetings and other fixed tasks. Allocate time to the tasks you plan to do off your “to do” list. Plan in enough flexibility to deal with the unexpected, and at least one review point at which you can check your direction and make adjustments.

- Integrate project tasks with your day-to-day tasks and calendar. Do this by recording them on the same list and ensuring they are broken down to around the same size. If the average task size on your “to do” list is 15–30 minutes, for example, don’t have project tasks of four hours in length—they won’t get done.

- Motivate yourself to do longer-term tasks every day. Set yourself a goal of doing one longer-term task per day on each of your projects, or one task preparing for the next deliverable (i.e., not the current one) on every project.



Begin every day
by **spending five**
to ten minutes
getting a handle
on **your agenda**
for that day

Delegating effectively

Set time aside on a regular basis to plan which tasks and activities can be delegated to others. This may not be restricted to project tasks: in order to have the time for project management, you may find that you have to delegate other parts of your job, too.

Getting delegation right

Successful delegation is not always easy, especially if you are managing a small project within a multiproject environment. As the manager of a small project, you can expect to find yourself delegating longer-term tasks to busy people who may only have a partial understanding of what you are trying to achieve, and for whom your project is a relatively low priority. When deciding which tasks and activities to delegate, take time to consider the benefits you could expect from delegating a particular task, and the blocks that you would need to overcome. Once you have identified potential opportunities for delegation, clarify the specifics of how you could achieve them by asking yourself:

- What is the required outcome or deliverable from delegating this task?
- Why is this important?
- How will it be used and when is it required by?
- What constraints are there on how the result can be achieved?
- What could go wrong?
- Who should I delegate this task to?
- Why should they do it?
- What objections might I need to overcome?
- What help will they need?
- What level of authority can they handle?

Overcoming barriers to delegation



GET EXPERIENCE

The best way to learn how to delegate is to have someone who delegates effectively to you. Note the attitudes and behaviors that overcome or bypass resistance and use them when you delegate.

Take time to consider the **benefits** you could expect from **delegating a particular task**, and the blocks that you would need to overcome

BEAT INDECISION

Try to make **quick decisions** as to who to approach and what precisely has to be done, and don't procrastinate about approaching the sponsor if his or her involvement is required.

FIGHT GUILT

Nice people don't like delegating unpleasant tasks. However, most **effective leadership** requires a hard head as well as a soft heart.

PLAN WELL

Think ahead, so you don't discover tasks that have to be done when it is too late to ask anyone else to do them.

TACKLE FEAR

Fight any feelings that delegated tasks will not be done properly or on time, that your delegation request will be rejected, or that you will be shown up by someone doing a job better than you.

30%

of **managers** think that they **delegate well**

Preparing to delegate

Where possible, delegate straight from the plan: as soon as you have identified a task that needs to be done, select someone to do it. If they are present when the task is identified, use that moment to pass responsibility to them. Give delegates as much warning as

possible: it is preferable to have three weeks' warning of a deadline, rather than three days. Warn people of impending delegation, even before you are clear on what you want done. Brevity is of the essence and it's not a bad idea to use a standard format for this "heads-up message" (see left).

How to compose a heads-up message

DEFINE THE SCOPE OF THE TASK

Give a general description of the task to be delegated, e.g. "I've got some figures I need you to analyze."

SET A TIMEFRAME

Describe when work is likely to start and when it will be needed, e.g. "I will brief you on Monday for a deadline on Friday. The task should take about four hours."

ASK THE DELEGATEE TO PREPARE

Let the person know what they can be doing to prepare themselves for the work, e.g. "Can you set aside that amount of time next week?"

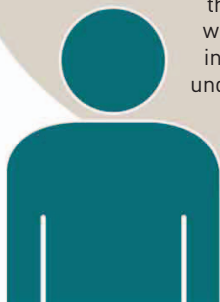
SET A MEETING DATE

Give a time and a place for a delegation meeting, e.g. "We'll meet in the boardroom on Monday at 10am. Please bring your diary."

Setting the details

Arrange a formal meeting to describe the details and parameters of the task to the delegatee. It is vital that your colleague has fully understood and is committed to what they have been asked to do. Asking "Do you understand?" is simply not good enough: it is a closed question and as such will generally receive just a "yes" or "no" answer. Instead, try to ask open questions, such as "How do you plan to do this?" This will give you a good idea about their level of understanding.

Part one Describe what is required, by when, and at what cost; why it is required; and the context and parameters of what is required, including any restrictions on the methods to be adopted. By giving people whole jobs or the context of the whole job you will increase people's understanding and motivation.



In focus



GIVING FEEDBACK

Longer-term delegation benefits greatly from formal (diarized) review and follow-up sessions. Follow the adage: “People don’t do what you expect—they do what you inspect!” Ad-hoc checking is generally sloppy and inefficient—in fact, imprecise questions such as: “How are things going?” result in inexact answers, such as: “Oh, fine!” and almost invariably lead to problems at completion with missed deadlines or partial delivery. When reviewing a delegatee’s work, accept what is good enough, don’t criticize irrelevant details. Accept that a task may have been done differently to how you would have done it.

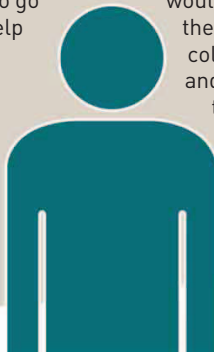
Holding a split meeting

Organize your delegation meeting in two parts with a “gap” to give the delegatee time to reflect before being invited to explain how they will approach their task:



Gap Give your colleague time for reflection alone. Create the gap with a statement such as: “Let me get us a cup of coffee while you stay here and have a think about the task. When I come back you can tell me how you’re going to go about doing it and what help you’ll need from me.”

Part two Ask your colleague to brief you on any modifications that should be made to the goal (where appropriate); the way they plan to approach the task; what help they will need from you; and when they would like to review progress. Once the task is complete, give your colleague immediate feedback, and pass a summary on to the relevant manager where appropriate.



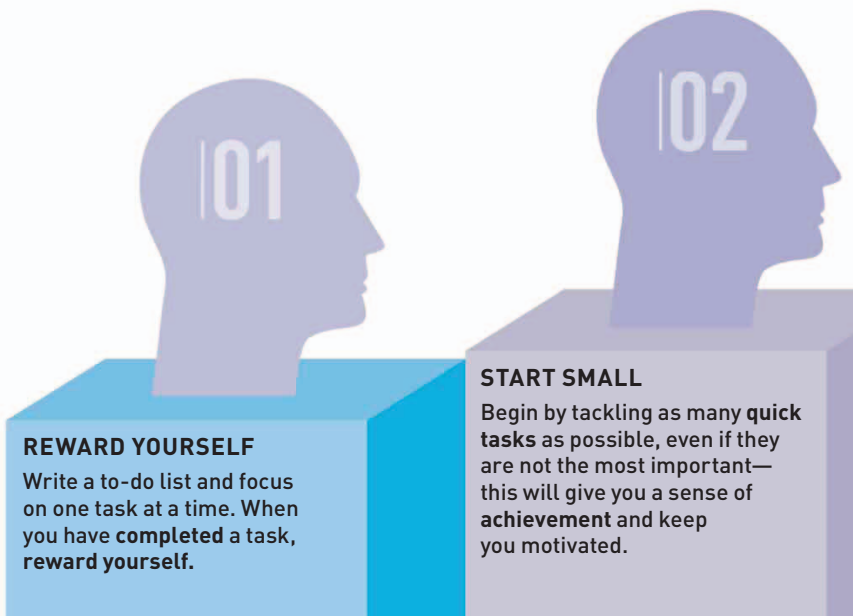
Maintaining momentum

Project work often requires effort over a prolonged period with little to show for it, so maintaining motivation can be a challenge. Procrastination is an ever-present danger, particularly on tasks that require high levels of concentration or challenging conversations with colleagues or clients.

Motivating yourself

Before you can start to motivate your team, you first have to motivate yourself; if you are not enthusiastic there is little chance that others will be. Do this by a combination of revisiting the end result—reminding yourself of its value and what it will be like to achieve it—and monitoring progress. Be sensitive to the first signs of procrastination and act quickly to ensure that internal resistance is never given the chance to build up.

Decide what **one thing** you will do **immediately** to **progress the task**, and then do it



01

REWARD YOURSELF

Write a to-do list and focus on one task at a time. When you have **completed** a task, **reward yourself**.

02

START SMALL

Begin by tackling as many **quick tasks** as possible, even if they are not the most important—this will give you a sense of **achievement** and keep you motivated.

Beating mental blocks

Sometimes you can reach a point of near paralysis on a task. If this happens, try using this technique for reenergizing yourself: take a blank piece of paper and write the task on it. Then write for three minutes continuously about the task.

Keep the pen moving, and jot down anything that comes to mind: why the task needs to be done; why you haven't done it; who else is involved; other ways of doing it; and steps for dealing with it. Now go through what you have written and highlight any insights or action points. Decide what one thing you will do immediately to move the task forward—and then do it. Most people report an

immediate rise in energy that, coupled with an increased understanding of the task, enables them to get over what had built into an insurmountable hurdle in their mind.

Tip



DON'T PROCRASTINATE

Avoid putting off challenging tasks—every time you do so, you put a brake on your **motivation** for the project as a whole.



|03

LARGER PROJECTS

Break down projects that seem large and daunting into a series of small tasks. Set yourself **goals** and **timescales** for each task, and you will soon complete the project.



|04

DIFFICULT TASKS

Challenging decisions and actions are often avoided, but **consider** what will happen if you do nothing. **Overcome your fear** and begin the task—it will help build your **confidence**.

Motivating others

Motivating members of your project team can be difficult for a number of reasons:

- Long-term deadlines are always in danger of being pushed into the background by the distractions and crises of the day-to-day workload.
- Nonroutine tasks are prone to procrastination.
- Team members may not see a connection between their effort on tasks, the project achieving its objective, and any benefit to them.
- People with a hierarchical mindset may resent doing work for a project manager who is less senior than them. Approach such people positively, but be prepared to escalate a problem as soon as you recognize that it will be beyond your capability to deal with it.

Plan ways to keep motivation levels high (see right), but also use your risk assessment to identify points where momentum may be lost, detailing escalation measures where necessary in the risk log.

How to motivate your team



01 |

02 |

03 |

04 |

45% of US managers
and supervisors
are **motivated**

Break the project down into meaningful products that can be completed on a regular enough basis to maintain a sense of progress.

Be open about the possibility of procrastination and discuss ways to overcome it.

Always delegate in the context of the overall project.

Find an engaging way to represent progress, rather than just marking checks on a list (stars on a chart, perhaps, or candy from a jar).

23% of nonmanagement
workers in US are
motivated



Communicating successfully

As the project manager, you are the hub of all communication within the project team and between the project team and the outside world. At different stages of the project you will find yourself dealing with different stakeholders, but the three constant lines of communication you need to maintain are with the sponsor, the client, and the team.

Engaging your sponsor and client

Communication with the sponsor should be characterized by a high level of openness and trust from the start of the project. Spend time establishing how your communication will work. Discuss scheduled communication (such as planned review meetings) and agree on when and how you expect ad-hoc communication to take place. Give warning of any decisions that need to be made and present facts to the sponsor in a written form for consideration. Record notes of all meetings, in particular, any action points.

Communication with the client will tend to be more formal than with the sponsor. The challenge is often to be assertive, particularly when requesting decisions, access, or information. As with the sponsor, it is important to give the client notice of any decisions. The client relationship can occasionally contain an element of politics, particularly if the client is under pressure from members of his or her organization. As a general rule, aim to do everything you can to make your client look good. If it becomes apparent that this is not possible, use the sponsor to bypass the obstacle.

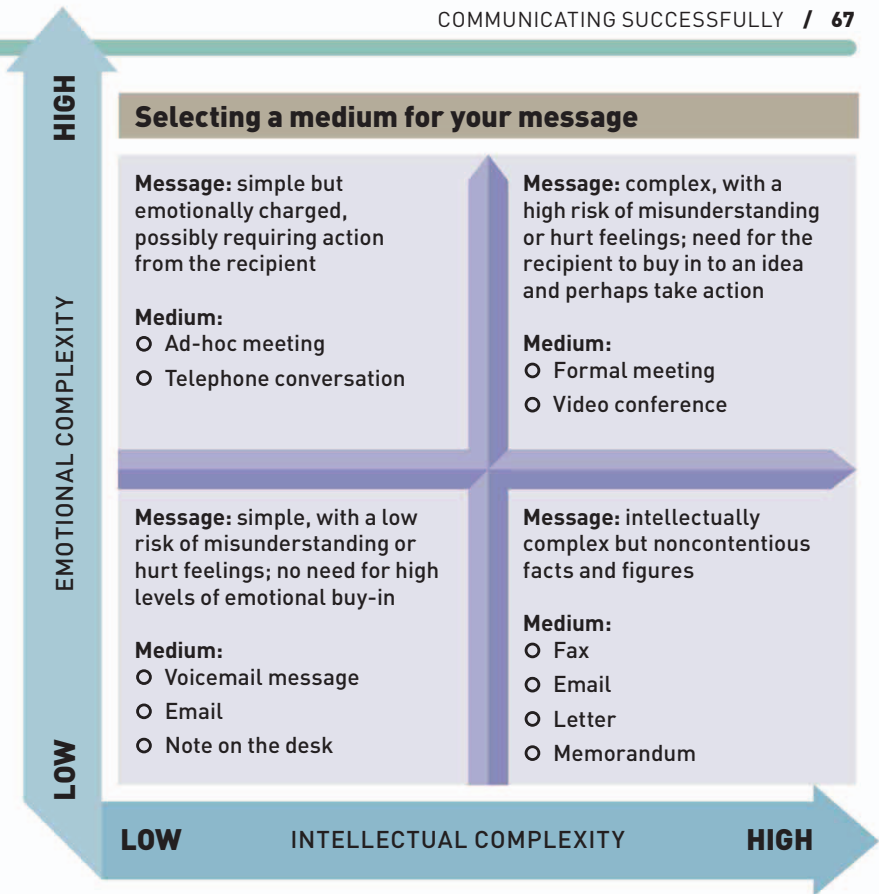
ASK YOURSELF...

Am I a good listener?

YES NO

- | | | | |
|----------|---|--------------------------|--------------------------|
| 1 | Do I turn off my self-talk, so that I can focus on the speaker and understand his or her perspective? | ☐ | ☐ |
| 2 | Do I clarify vague statements, to find out whether what the person is saying is factually and logically correct ? | ☐ | ☐ |
| 3 | Do I try to assess how people are feeling, and ask probing questions to understand what lies behind those emotions? | ☐ | ☐ |





Talking to your team

Maintain an open and honest relationship with your team. In large teams, there is always a danger of some people being left out of the loop when decisions are made or new information becomes available. Make sure you have accurate distribution lists set up for email and documents. On larger and longer-running projects, you may find it helpful to post general information on an intranet site to which team members have access.

Choosing the method

Care is needed when selecting the medium by which you will communicate a particular message. Sending a sensitive message by email, for example, means that you run the risk of causing a potentially damaging misunderstanding with the recipient. Before pressing "send," take time to think about your purpose in communicating, what you want the outcome to be, and how "complex" the message is in emotional and intellectual terms.

Reviewing progress

Getting the team together is costly in both time and resources, but well-run review meetings are an essential ingredient in any project, offering you the opportunity to check past progress and confirm future direction. They also renew people's identification with your project team.

Keeping track of progress

An effective review meeting should be one part of a continuous cycle of activity. Prior to every meeting, all team members should work toward completing their tasks, and if they fail to do this within the set timeframe, noncompletion should be reported to you. Use this information to formulate and circulate an agenda for the review meeting, with minutes of the last meeting attached as

preparatory reading. At the meeting, start by discussing progress since your last review, then make decisions about what tasks need to be completed before the next time you meet. Delegate specific actions to members of the team. Record these actions in "Action minutes," which should be circulated as soon after the meeting as possible. This will give each individual the best chance of completing their tasks prior to the next meeting.

CHECKLIST...

Preparing to chair a review meeting

YES NO

- 1 Are you **up to date** with all aspects of your own project work? (If your project work is behind schedule, you won't have the **authority** to chase others for theirs) ☐ ☐
- 2 Do you **know** who will be there and how they are doing with the tasks they have been set? ☐ ☐
- 3 Have you set aside **extra time** so that you can arrange the room and set up equipment before other people arrive? ☐ ☐
- 4 Are you **feeling calm**? (If you are stressed, this is likely to rub off on other people) ☐ ☐
- 5 Are you **prepared to challenge** people who have not done what they are committed to, or who are behaving in a disruptive manner? ☐ ☐



RUNNING SUCCESSFUL REVIEWS

Do's

- Sending the agenda for the meeting in advance
- Ensuring that agenda items run to time, without having to be rushed
- Allocating action points to attendees with agreed deadlines
- Finishing with a discussion about what has been learned for next time

Dont's

- Holding ad-hoc review meetings with no preparation
- Allowing the discussion to wander and side issues to dominate
- Assuming that everyone will know what they have to do
- Accepting excuses without discussing how things can change

Scheduling review meetings

Review meetings can be scheduled as a regular event—at the same time of every day, for example, or on the same day of every week or month. Alternatively, the meetings can be fixed to the expected delivery date of certain products or to stages of the project. Both of these approaches have their strengths and weaknesses: regular meetings in the same place and at the same time are more prone to “game playing” and a lack of concentration among attendees, but meetings set by the delivery dates of your project are more difficult to schedule to ensure that everyone can attend.

Tip

KEEP IT BRIEF

During busy periods, hold short “stand-up” **review meetings** early in the day, or at a point when most people would expect to be taking a break. Insist on a **prompt start, brief contributions**, and no deviation from the main purpose of reviewing progress and **coordinating activity** through the next period.



Managing project information

“Filing” lacks the star quality of other aspects of project work and rarely rates in people’s top three most enjoyable or rewarding job roles. Nevertheless, if you want to be in full control of your project, management of paper-based and electronic information is essential.

Assembling your project folder

Set up a project folder or filing system to manage your project documentation as part of the initiation phase of your project. Whether you use an online or hard-copy system, or both, there are general steps to follow.

Compile a checklist—the document schedule—listing the records that it contains, and label this file clearly in your online folder or place it at the front of your hard-copy project folder. This will enable anyone looking for a document to see at a glance whether it is in the folder. Use the document schedule to structure your conversation with the sponsor about the various records that will be required at different points in the project.

Tip

TAG YOUR DOCUMENTS

Use **different colors** of paper for different types of document (minutes, sign-offs, etc.), and **mark** every project document with the **date/time** of creation and a version number from the outset.



Contents of a project folder

01

02

03

04

05

06

07

Organizing the contents

Even small projects can generate large amounts of documentation, so it is important that you plan how you will organize the contents of your folder. Version control can be helpful, because the drafting and signing-off processes can generate multiple versions of individual documents. Mark every document with a version number, and keep archive versions (back copies you are keeping pending a final review, for example) in a separate part of the project folder from “reference” information—such as the current project plan—that is in regular use.

File active documents (those requiring a specific future action) in date order using a “Bring Forward” file, and use the reminder system in your electronic task list or calendar to flag important dates.

DOCUMENT SCHEDULE

Like the index in a book, the document schedule should tell you at a glance what paperwork the file contains. It can be a useful checklist: score through the documents that are not needed and put the date of entry for any document you put into the file.

TEAM ORGANIZATION CHART

Keep a chart setting out who is doing what in your team. This allows anyone examining the file to see who they should approach on a particular matter. Include contact information and distribution lists.

DEFINITION DOCUMENTS

Keep a suite of documents that set out the definition of your project. This may include the mandate, brief, business case, PID, and any legal contracts or client agreements.

CHANGES TO SCOPE RECORDS

Keep these records close to the definition documents so that the material they contain is always accessed alongside the original scope to which they refer.

PROJECT PLAN AND BUDGET

Always keep the baseline plan and budget in the file, along with the most up-to-date versions. Archive intermediate versions elsewhere to avoid confusion.

RISK LOGBOOK

You will refer to this document almost as often as you do to your plan and budget, so make sure you keep the risk logbook in your project file up to date with constant review.

THE MINUTES OF REVIEW MEETINGS

Keep records of minutes that include live action points or significant points of reference in the project file. Archive all others to ensure the file doesn't become cluttered or confused.

Monitoring costs

While it is important for you to monitor the schedule of the project and maintain focus on the outcome, it is equally vital that you keep track of the costs your project is incurring. Failure to do so can result in a project that, while seemingly successful, is actually uneconomic.

Managing project accounts

Effective cost monitoring throughout the lifecycle of a project is important for a number of reasons: it enables you to give the sponsor a true picture of progress whenever you are asked for it; it reduces risk by ensuring decisions to modify or cancel the project are taken early; it identifies areas of inefficiency; and it provides valuable information for planning future projects. Keeping track of your costs is also important because it could highlight theft or fraud. Like any other pot of money, project budgets occasionally attract criminal attention. If you are the person responsible for controlling expenditure, you may be liable unless you can demonstrate that you have used suitable procedures for monitoring costs.

Keeping track of costs

If you are managing a small project, you may not have a budget for out-of-pocket expenses—paid to external organizations for materials or services—but you would be advised to keep track of the invisible cost of the work undertaken by your internal team. Particularly in a multiproject environment, timesheets provide a mechanism for charging expenses back to the right client or cost center. Out-of-pocket expenses generally attract heavy scrutiny. Nevertheless this

How to monitor invisible costs

Use a timesheet system to keep track of time spent by your internal team.

Allocate a financial value to the time recorded on the timesheets.

Base calculations on the worker's salary broken down to an hourly rate.

Add in the overhead cost of employing that person (heating, lighting, office space, etc.)

budget can come under pressure either because of inaccurate estimates at the definition stage, additional features added to the scope without parallel increases in the budget, or poor risk management. If you are responsible for the budget, ensure that you are clear on the reasons for any unforeseen expenditure before authorizing payment. Check the impact on other aspects of the budget: are you using money for desirable but nonessential features, leaving later essential features underfunded?

Tip**DON'T IGNORE HIDDEN COSTS**

Beware of the seductive but potentially false

logic: "We don't have the budget for that, so we'll do it **ourselves.**"

Dealing with cost overruns

Not every cost overrun is serious—sometimes expenses run ahead of plan simply because work is progressing more quickly than anticipated. On other occasions, you may have underestimated the cost of a "one-time" item of expenditure, but feel this could be offset by an overestimate elsewhere. The point at which even a minor overspend should be taken seriously is when it is early warning that you have underestimated a whole class of activity upon which the project depends. Tell the sponsor as soon as you perceive that unforeseen expenses may require an increase in the overall project budget. If the budget is fixed (critical), identify any nonessential features you can remove from the scope to bring expenses back in line.

Case study**ADJUSTING TO CHANGE**

The property department in a law firm won a contract to review 6,000 files for a local government agency. They priced the job at \$1.5 million, based on two hours per file after a start-up period. This proved accurate—experienced team members took just under two hours per file. However, the volume of work and tight schedule meant that morale dipped and staff turnover increased. The constant need to induct new staff pushed the average

time per file for the first thousand files up to 2 hours 15 minutes. This would have caused the contract to overshoot by 12.5 percent, costing the firm \$185k in lost revenue. The head of the department negotiated replacements from other departments to spread the workload and offered incentives to raise morale. Thanks to the early intervention, productivity returned to less than two hours per file, and the project hit its projected profit margin.

Managing changes to scope

It is sometimes necessary to change or rescope a project in order to adapt to circumstances that were not known when you drew up the definition. You must manage these changes carefully to avoid any misunderstanding among you, your sponsor, and the client.

In focus

Scope creep

The term “scope creep” is a term used to describe uncontrolled changes to the scope of a project. It is described as “creep” because the changes happen in such small steps that they go unnoticed until their true impact becomes apparent in the runup to implementation. Sloppy project managers sometimes blame “scope creep” when they fail to deliver features that they should have spotted in the initial brief. However, it can also be caused by clients changing their minds or trying to get more than they have paid for in a commercial project.

Changes happen in such **small steps** that they go unnoticed until their **true impact** becomes apparent

Common reasons for changes to a project's scope

67%

of projects in
low-performing US
organizations **fail**

A RISK GOES BAD

The technology doesn't work, for example, or a legal hurdle cannot be overcome.

NEW PERSONNEL

The client changes (a new person comes in with new ideas).

INDECISION

The client changes their mind about what they want.

USAGE CHANGE

The circumstances in which the end product will be used have changed.

LOSS OF RESOURCES

The resources available to the project change (the budget is cut or increased, for example, or people with vital skills are moved out of or into the project team).

POOR PLANNING

It becomes apparent that the original scope is impossible to deliver within the set time or cost constraints.

ADDED BENEFITS

New facts or technological advances would enable the project to deliver valuable additional benefits if the scope were modified.

15%

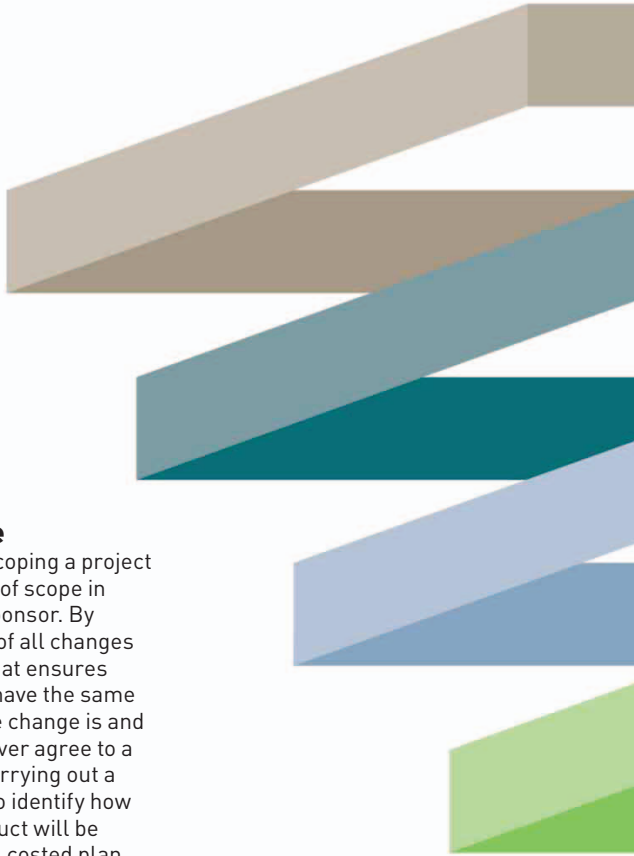
of **US**
organizations
are agile and
able to **respond**
to change

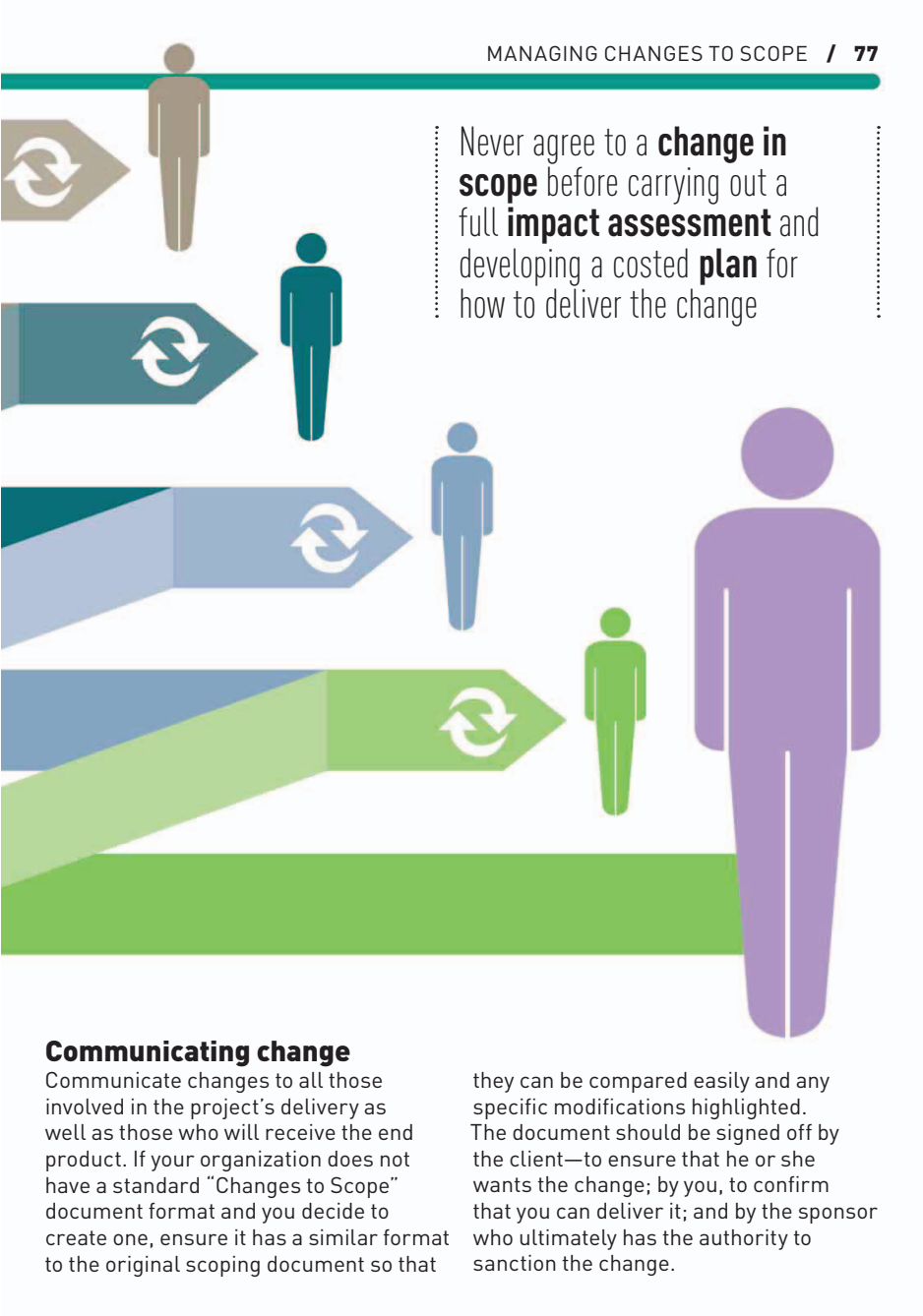
Defining the change

The golden rule when rescoping a project is to agree on all changes of scope in writing with the project sponsor. By creating a written record of all changes you create an audit trail that ensures that you and the sponsor have the same understanding of what the change is and why you are making it. Never agree to a change in scope before carrying out a full impact assessment, to identify how other features of the product will be affected, and developing a costed plan for how to deliver the change.

100

million dollars **is lost for every**
\$1 billion spent each year
by organizations on projects





Never agree to a **change in scope** before carrying out a full **impact assessment** and developing a costed **plan** for how to deliver the change

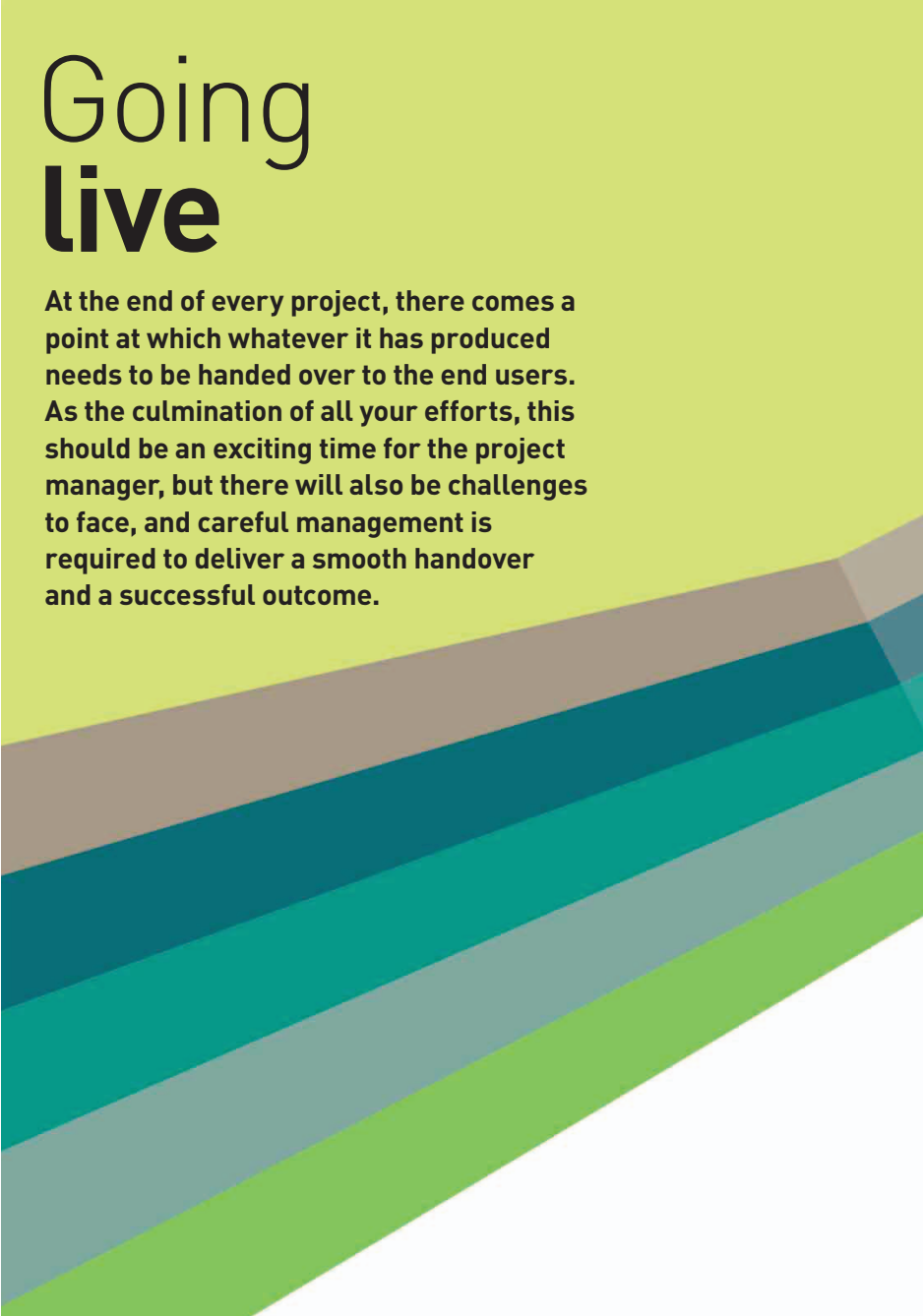
Communicating change

Communicate changes to all those involved in the project's delivery as well as those who will receive the end product. If your organization does not have a standard "Changes to Scope" document format and you decide to create one, ensure it has a similar format to the original scoping document so that

they can be compared easily and any specific modifications highlighted. The document should be signed off by the client—to ensure that he or she wants the change; by you, to confirm that you can deliver it; and by the sponsor who ultimately has the authority to sanction the change.

Going live

At the end of every project, there comes a point at which whatever it has produced needs to be handed over to the end users. As the culmination of all your efforts, this should be an exciting time for the project manager, but there will also be challenges to face, and careful management is required to deliver a smooth handover and a successful outcome.

The background of the page features a series of diagonal stripes in various shades of yellow, brown, teal, and green, creating a modern, abstract design.



80		IMPLEMENTING THE PROJECT
84		PREPARING FOR HANDOVER
86		HANDING THE PROJECT OVER
88		EVALUATING SUCCESS
90		REVIEWING THE PROCESS

04

Implementing the project

Ensuring that the client, the team, and your organization have a positive experience as your project “goes live” is one of a project manager’s most important responsibilities. The decisions you make during every phase of your project’s life cycle should be with implementation in mind.

Overcoming challenges

Implementation is primarily a client-focused phase of a project. However, you should also consider its significance for the end user, the project team, and your organization. As the project goes live, end users have to assimilate changes and come out of their comfort zone, while project team members have to let go of a project and move on to something new. Your organization simply wants swift and trouble-free implementation in order to realize the benefits of their investment. Your role as project manager is to help all three groups deal with these challenges.

89%
of projects in US
high-performing
organizations
are completed



An abstract graphic featuring several 3D arrows and vertical bars in various colors (blue, purple, yellow, green, brown) arranged in a staggered, overlapping fashion. The arrows point to the right, and the vertical bars are positioned at different heights and depths, creating a sense of movement and progression. The text is placed within a white rectangular area on the right side of the image.

As the **project goes live**, end users have to **assimilate changes** and come out of their **comfort zone**

Key actions for successful implementation

PHASE OF PROJECT

INITIATION PHASE

Describe the issue to be addressed or opportunity to be exploited.

DEFINITION PHASE

Design an end product that satisfies the need identified in initiation.

PLANNING PHASE

Design a communications plan that delivers the information that different stakeholders need; and ensure that the resources are available for successful implementation.

CONTROL PHASE

Ensure that all stakeholders are kept informed on progress and manage people's expectations.

IMPLEMENTATION PHASE

Present the product in the most positive way possible, demonstrating an understanding of all stakeholders' needs.

Include time and budget for implementation activities such as rehearsals, marketing, training, and change in management

ACTIONS

- **Conduct research** among end users to establish how widespread the issue or opportunity is.
 - **Document findings** and, where confidentiality allows, **circulate** them to those who contributed.
-
- Wherever possible, **design the product** in consultation with the client/end user—attribute good ideas to those who offered them.
 - Give an **indicative date** for implementation.
 - Use prototypes and mockups to **bring the idea alive** both for the client and the project team.
-
- Find out what **aspects of progress** the stakeholders are interested in and how frequently they want reports, then create a **communications plan** to deliver this.
 - Plan in time and budget for **implementation activities** such as rehearsals, marketing, training, and change management.
 - **Book facilities**, equipment, and personnel required for implementation as soon as you have a launch timetable.
-
- **Deliver the communications plan**, and take advantage of any unexpected opportunities to promote your project.
 - **Find opportunities** for listening to stakeholders' **hopes** and concerns.
 - Tell all stakeholders about any **changes to the product** or launch date, explaining why these have occurred.
 - **Create the materials** (documentation, guides, manuals, etc.) required to support implementation.
 - Train those who will **support the product** once it has gone live.
 - Recruit end users who will **test the product** as soon as it is ready for implementation.
 - **Plan and rehearse** implementation events.
-
- Get end users to **test** what you have produced (**User Acceptance Testing**).
 - Hold **implementation events** to roll out the end product.
 - **Train or brief end users** and distribute supporting documentation as necessary.
 - Get the sponsor to **inspect** the finished product and **sign it off** as complete.
 - Hold a **celebratory event** with the project team.
 - Reassign project personnel, **providing feedback** to them and their managers as appropriate.

Preparing for handover

Although the majority of work has been done, projects can sometimes stall at the implementation stage. You may run out of budget or lose members of your team to other projects, or there may be last-minute changes from the client as they realize that implementation is imminent. Careful management at this stage ensures that your handover to the end users goes as smoothly as possible.

Managing the final stages

As a project nears completion, team members can often feel jaded; the novelty that drew them to the project in the first place has become a distant memory. To reinvigorate your team, hold a pre-implementation meeting with all those involved, including clients and end users wherever possible. The core purpose of this meeting is to produce a detailed route map through to completion, but a well-run meeting can do wonders for your team's motivation and focus—especially if they see the client's enthusiasm for what you are about to deliver.

Steering the end game

Your role in the lead up to implementation is primarily one of problem solving and coordination of the activity required for the project to “go live.” Go around and see all stakeholders, particularly team

Tip



HOLD ON TO YOUR TEAM

Tell **team members** that they are finished on your project only when you are absolutely **clear** that this is the case.

members. Show an interest in what they are doing but resist the temptation to step in unless they really cannot do what has been asked of them without your help. Increase the frequency of review as you get close to your final date, but do not allow these meetings to get in the way of the work they should be doing. If everyone is in the same building, for example, a 10-minute “stand-up” meeting may work best, while conference calls are a sensible alternative for multisite projects.

10 minutes may be sufficient **time** for **review meetings** in the **final** project stages

Running final tests

For some projects, User Acceptance Testing (UAT) is one of the last steps before implementation. Most frequently found in software development as the final technical test of a product, UAT may also be applied in a variety of situations. The testing is carried out by a representative panel of end users, who work through as many different scenarios as necessary to be sure that the product will perform as expected when it goes live. UAT must not be used to confirm that the product is what the end users want—that should have been defined in the project scope and any subsequent “changes to scope” documents.

Hold a **pre-implementation meeting** with all those involved, including **clients** and **end users**

How to hold a pre-implementation meeting

Review the original scope of your project, and talk through the plan you have used to achieve it.

This serves as a reminder of why the **project is important** and highlights how much has been achieved.

Make a detailed implementation plan, using the team planning technique that you used to generate the overall plan.

Encourage creativity, and make it your business to secure the resources needed to **deliver a successful** handover.

Create a project closure checklist, with detailed timings and responsibilities, in a form that can be used to chart progress.

Make sure everyone leaves the meeting knowing precisely what they have to do and by when.

Handing the project over

The way in which a project “goes live” varies from project to project, depending on the nature of its product. With time-critical projects there is rarely any doubt about the “go live” point, but where quality is the critical factor the opposite is often the case, and it takes a conscious effort to mark the point at which a project is complete.

Signaling the end point

Projects are different to business as usual because they have an end point at which they can be declared complete and then have their success evaluated. Even if you are the only person working on a project, it is still helpful to mark the “go live” point. This will send a clear signal that the project is finished and that you and the rest of the project team will be moving on.

For most projects, implementation should coincide with the transference of responsibility from the project team to an ongoing support function. Perversely, the better you and your team have managed the client while the project was underway, the more difficult you will find it to get them to transfer their allegiance to a new group. By marking the “go live” point, you make a definitive statement to your client that the time has come for this to happen.

By marking the “go live” point, you make a definitive statement to your **client**

CHECKLIST...

Marking “go live”

YES NO

- 1 Have I made a **clear declaration** to all stakeholders that the project is complete? ☐ ☐
- 2 Have I **clearly signalled** to the client and end users that they are now responsible for the product? ☐ ☐
- 3 Have I **marked the point** at which project personnel are available for other assignments? ☐ ☐
- 4 Have I taken the **opportunity to say thank you** to those who have contributed to the project? ☐ ☐



Case study



OILING THE WHEELS

A project manager charged with moving 40 people from an office in the heart of London to more spacious but cheaper premises in a less affluent part of London faced a challenge to ensure smooth implementation: the move was for financial reasons and no one wanted to go. He decided to put together a welcome package for each member of staff and asked every store, bar, café, restaurant, and gym in the area around the new offices whether

they would make introductory offers to the newcomers once they produced their company ID cards. On the day of the move, he placed the finished package of discounted goods and services on each desk in the new offices. The offers it contained actively encouraged people to explore the area rather than simply sit at their desks and complain about their new surroundings. And when they did take advantage of the offers, they found that they were welcomed as valuable customers.

Holding an event

Hold a “go live” event (perhaps couched as a final review meeting) to review the whole project. Evaluate the changes and benefits it has achieved. Consider how to organize the event so that there are things for people to see, do, and talk about. However, make sure it is appropriate—if you overplay “go live” you may be accused of self-promotion. Involve the project sponsor in the event and thank all those who have contributed.

Another pretext for an event might be to introduce the client or end users to the people who are about to begin supporting them. Reiterate the post-implementation support that will be available and how post-project support will take place. This period is the time to identify and resolve minor defects that take place during the implementation phase, prior to the project being declared complete. Make sure that everyone understands the part you need them to play in putting the project to bed.

Providing support

In a quality-critical project, the quality of post-implementation support given to the end user is essential to its long-term success. Never declare a project complete until the end user has been trained to use the product and first-line support is available from outside the project team.

Tip



TAKE ADVICE

Speak to your **sponsor** about your plans for marking “go live.” Ultimately it is up to him or her to decide when the project is complete.

Evaluating success

Once the end product has been delivered the project manager's final act should be to review the outcome of the project and evaluate its overall success. It can often be illuminating to make this post-implementation review against both the original scope and any subsequent modifications.

Analyzing the outcome

You should review the success of your project in a number of ways. First, look at your immediate impression: did the project deliver what was expected? This level of review is best done at the same time as implementation—in fact, it should be part of the sign-off procedure involving sponsor, client, and project manager. The review process should also look at whether the project has delivered a long-term benefit. In time-critical projects, this may already be at least partly evident at implementation or shortly afterward, but in quality-critical projects the benefits may take longer to become clear. Finally, your evaluation should look at the benefits gained in business terms. Was the project worth it financially?

Tip

INVOLVE THE SPONSOR

Try to get the sponsor involved in the **review process**—experience suggests that without their **involvement**, the review rarely gets done as people are busy and move on to the next job.



GIVE A PERSONAL REWARD

Send an appropriate gift to members of the team at their homes with a personalized note: a bottle of **Champagne**, a bunch of **flowers**, vouchers for a **spa**, or **tickets for an event** can all deliver a **far bigger message** than the money that they cost.

GIVE BONUSES

Team members will always appreciate a **cash bonus**, if funds are available.

Did the **project** deliver what was **expected**? Was the project worth it **financially**?

GIVE A PROJECT GIFT

Give a tailor-made project present to thank people for taking part. This gift does not have to be expensive but should be tasteful, fun, and/or useful.

EXPRESS YOUR THANKS

Hand-write a personal letter to each team member expressing **thanks** for his or her personal **contribution**, making the effort to **write something different** in each one.

Ideas for celebrating success

COMMEMORATE THE OCCASION

Write an article for your in-house e-newsletter or your organization's website. Remember to thank **all the team** and show how their work helped to achieve aims and benefit the whole organization.

ALLOCATE FUNDS

Put a small "**celebration fund**" into the project budget, which increases or decreases depending on whether the project is ahead of or behind time and budget. At the end of the project, hold a **social event**, involving everyone who contributed, at which you and the sponsor (and client if appropriate) can express your thanks.

88%

of **US executives** say that **strategy implementation** is an **important factor** for their firms

Reviewing the process

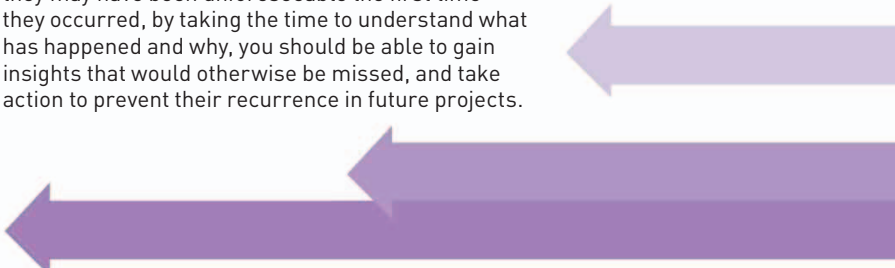
A “lessons learned” review allows you to learn from the process you have been through and helps you find ways to improve your project management. Because the project process should be repeatable, the main purpose of review is to establish what went well, what could have gone better, and what you can do to improve future projects.

Looking back at your project

The review process is your chance to learn from experience. It is not just about spotting errors or identifying parts of the process that did not run as smoothly as they could have—evaluation of what was successful is equally informative. If something worked particularly well (such as a technique or a supplier), it should be noted for future reference.

However, inevitably there will be some things that go wrong in your projects, and these also provide valuable lessons for the future. Although they may have been unforeseeable the first time they occurred, by taking the time to understand what has happened and why, you should be able to gain insights that would otherwise be missed, and take action to prevent their recurrence in future projects.

If something **worked** particularly well (such as a technique or a supplier), it should **be noted** for **future reference**



44%

of strategic **initiatives** do not meet their **original goals**

Learning from the details

When reviewing the project, consider all aspects of the process in detail. Do not rely on opinions about what went well or make assumptions about what went wrong: talk to those involved and try to discover the facts. When these are in dispute, ask for evidence. Be curious about why things happened, and explore how this could inform future project decisions. When searching for the

PLANNING PROJECTS FOR LEARNING

Do's

- **Establishing quality assurance procedures from the outset**
- **Giving personal learning objectives for the project to all team members**
- **Including “lessons learned” as a regular agenda item for meetings**
- **Having a team culture characterized by high levels of feedback**
- **Establishing mechanisms for disseminating new ideas**

Don'ts

- **Allowing an experienced project team to perform their roles out of habit**
- **Being cynical about the organization's ability to do things differently**
- **Considering change a threat to what has been successful in the past**
- **Allowing a blame culture, in which it is dangerous to admit mistakes**
- **Holding the project plan centrally and discouraging discussion of its details**

truth, be sensitive to the feelings of those involved: reviews should never become witch-hunts.

Once you have a good understanding of how everything worked, make sure that you act on your findings. Project learning is done for a purpose—to improve performance on future projects. Don't keep useful information and ideas to yourself—pass them on to where they can make a difference.

Holding a project review

A “lessons learned” review meeting is your opportunity to get the team together and discuss how the project went. Hold the meeting as soon as implementation is complete—you can always call a second one, if necessary, once the project has been embedded. Far from duplicating effort, you will find that you actually save time using this approach, because memories are clearer and conclusions are reached more quickly.

Involve as many stakeholders as is practical in this meeting. A process review should take account of the views of everyone involved, within the constraints of cost, time, and availability. If possible, include the views of the client and end user, although in commercial projects, you may need to think carefully about how you are going to get these.

Be clear on what you want to achieve and have an agenda for the meeting. A review meeting can become unfocused and descend into generalizations unless there are specific items to discuss. If you have held interim learning reviews, use the notes from these as a structure. If not, then the PID, plan, and risk logbook can be a good basis for discussion.

Aim for three **key learning points** clearly described so that anyone encountering a similar problem in the future can **implement your recommendations**

Tip

PLAN AHEAD

Set a date for the review meeting when you are **planning** the implementation of the project—this should make it easier to get the time in people’s schedules.



Documenting your review

Brevity is often the key to a successful project review document, so record the recommendations that you generate following the “lessons learned” review meeting succinctly. Aim for three key learning points clearly described so that anyone encountering a similar problem in the future can implement your recommendations. If you have to write more because the project was large and complex, structure the document in a way that enables people to gain an overview quickly and then select only the detail that is relevant to them. It can be useful to generate a main document that you distribute to all stakeholders—containing a limited number of key recommendations for the conduct of future projects—and a number of annexes. These can either cover each recommendation in detail or provide more detailed feedback to specific individuals or departments.

Discuss your recommendations with the sponsor. Even if the sponsor does not want to be fully involved in the review process, at the very least you should discuss the findings with him or her before disseminating them to a wider audience.

ASK YOURSELF...

What can we learn from this project?

YES NO

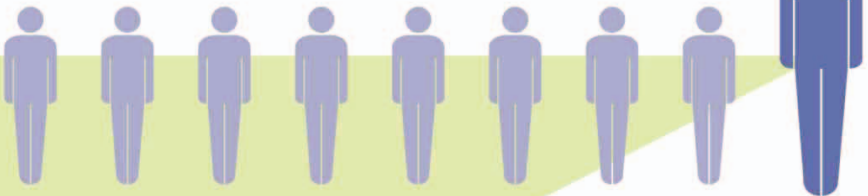
- | | | |
|--|--------------------------|--------------------------|
| 1 Was our original scope good? | ☐ | ☐ |
| 2 Were the time and cost estimates accurate ? | ☐ | ☐ |
| 3 Did we have the right mix of people on our team? | ☐ | ☐ |
| 4 Did the stakeholders work together effectively ? | ☐ | ☐ |
| 5 Might we have anticipated risks better? | ☐ | ☐ |
| 6 Did the technology we used perform effectively ? | ☐ | ☐ |
| 7 Did our project methodology work well? | ☐ | ☐ |
| 8 Were our project documents useful ? Were any missing? | ☐ | ☐ |

Giving personal feedback

The review phase of your project should also look at the performance of individual members of your team. Although you should have been giving regular feedback throughout the project, people appreciate a final review once it is completed, especially when they've put a lot of effort into making a project successful. You will find that the best workers use feedback from project reviews as a way to build their resume or gather references. Equally, people will be more likely to make a second effort if they know that failure will be investigated and recorded.

Tip**THINK SMALL**

Don't underestimate **the value** of small, easily implemented improvements to your approach. A "**lessons learned**" review should identify several of these, and their combined effect can be **significant**.



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